XEROX®

# DocuShare
# User Guide

Publication date: April 2007

This document supports DocuShare Release 6.0/DocuShare CPX Release 6.0

Prepared by:

Xerox Corporation
DocuShare Business Unit
3400 Hillview Avenue
Palo Alto, California 94304
USA

Copyright © 2007 Xerox Corporation. All Rights Reserved. Xerox ® and DocuShare® are trademarks of Xerox Corporation. All other trademarks are the property of their respective companies and are hereby acknowledged.

# Table of Contents


## Chapter 1 Getting started

Welcome . . . . . 1–2
Accessing DocuShare . . . . . 1–3
Navigating your site . . . . . 1–4
Understanding DocuShare objects . . . . . 1–5
Object permissions . . . . . 1–6
Object properties . . . . . 1–6
Logging in and out . . . . . 1–7
How to get help . . . . . 1–8
DocuShare User Group . . . . . 1–8
DocuShare Client applications . . . . . 1–9

## Chapter 2 Users and groups

About DocuShare accounts . . . . . 2–2
DocuShare user accounts . . . . . 2–3
Creating a user account . . . . . 2–3
Viewing user account properties . . . . . 2–4
Changing your user account properties . . . . . 2–4
Changing your password . . . . . 2–5
Changing your username . . . . . 2–5
Changing your domain . . . . . 2–6
Viewing your activity history . . . . . 2–6
Changing federation settings . . . . . 2–6
Deleting a user account . . . . . 2–8
DocuShare group accounts . . . . . 2–9
Creating a group . . . . . 2–9
Viewing group properties . . . . . 2–10
Changing group properties . . . . . 2–10
Changing the members of a group . . . . . 2–11
Changing the owner of a group . . . . . 2–12
Changing the domain of a group . . . . . 2–12
Sending mail to group members . . . . . 2–13
Viewing the change history . . . . . 2–14
Deleting a group . . . . . 2–14
Finding and listing DocuShare accounts . . . . . 2–15

## Chapter 3 DocuShare collections

About collections . . . . . 3–2
Adding a collection . . . . . 3–3
Viewing and changing collection properties . . . . . 3–4
Viewing the change history . . . . . 3–4

Changing the location of a collection . . . . . 3–5
Deleting a collection . . . . . 3–6
Editing multiple objects in a collection . . . . . 3–7
Using Copy, Cut, and Paste to change the location of an object . . . . . 3–8

## Chapter 4 DocuShare documents

About documents . . . . . 4–2
Adding a document . . . . . 4–3
Viewing a document . . . . . 4–4
Viewing a document and its properties . . . . . 4–4
Viewing an HTML rendition of a document . . . . . 4–5
Viewing a PDF rendition of a document . . . . . 4–5
Finding duplicate documents . . . . . 4–6
Editing a document . . . . . 4–7
Adding a new version of a document . . . . . 4–9
Managing document versions . . . . . 4–10
Viewing document versions . . . . . 4–10
Changing the preferred version . . . . . 4–10
Viewing the renditions of a version . . . . . 4–11
Viewing and changing version properties . . . . . 4–11
Locking and unlocking a document . . . . . 4–12
Exporting a document . . . . . 4–13
Adding comments to a document . . . . . 4–14
Viewing and changing document properties . . . . . 4–15
Viewing the change history . . . . . 4–15
Changing the location of a document . . . . . 4–16
Deleting a document . . . . . 4–17

## Chapter 5 Access permissions

About access permissions . . . . . 5–2
Viewing the access permissions of an object . . . . . 5–3
Changing the access permissions of an object . . . . . 5–4
Changing the owner of an object . . . . . 5–5
Applying permissions to the objects in a container . . . . . 5–6
Applying permissions to a document and its versions . . . . . 5–7

## Chapter 6 DocuShare calendars

About calendars . . . . . 6–2
Adding a calendar . . . . . 6–3
Changing the calendar view . . . . . 6–4
Viewing and changing calendar properties . . . . . 6–5
Viewing the change history . . . . . 6–5
Changing the location of a calendar . . . . . 6–6

Deleting a calendar . . . . . 6–7
Adding an event to a calendar . . . . . 6–8
Viewing and changing calendar event properties . . . . . 6–9
Viewing the change history . . . . . 6–9
Changing the location of a calendar event . . . . . 6–10
Deleting a calendar event . . . . . 6–11

## Chapter 7 DocuShare workspaces

About workspaces . . . . . 7–2
Adding a workspace . . . . . 7–3
Controlling access to the workspace . . . . . 7–4
Changing the users and groups in the membership group . . . . . 7–4
Re-assigning the membership group . . . . . 7–5
Changing the workspace's permissions . . . . . 7–5
Adding content to the workspace . . . . . 7–7
Managing shortcuts . . . . . 7–8
Using calendars . . . . . 7–9
Changing portlet properties . . . . . 7–10
Viewing and changing workspace properties . . . . . 7–11
Viewing the change history . . . . . 7–11
Changing the location of a workspace . . . . . 7–12
Deleting a workspace . . . . . 7–13

## Chapter 8 DocuShare wikis

About wikis . . . . . 8–2
Adding a wiki . . . . . 8–3
Adding content to a wiki . . . . . 8–4
Adding content to the wiki home page . . . . . 8–4
Linking pages to a wiki . . . . . 8–4
Inserting images . . . . . 8–5
Attaching documents . . . . . 8–5
Renaming wiki pages . . . . . 8–6
Printing wiki pages . . . . . 8–7
Viewing and changing wiki properties . . . . . 8–8
Viewing the change history . . . . . 8–8
Changing the location of a wiki . . . . . 8–9
Deleting a wiki . . . . . 8–10

## Chapter 9 DocuShare weblogs

About weblogs . . . . . 9–2
Adding a weblog . . . . . 9–3
Posting weblog entries . . . . . 9–4
Editing weblog entries . . . . . 9–4

Deleting weblog entries . . . . . 9–5
Approving entries . . . . . 9–5
Adding comments to entries . . . . . 9–6
Viewing comments . . . . . 9–6
Deleting comments . . . . . 9–6
Viewing and changing weblog properties . . . . . 9–7
Viewing the change history . . . . . 9–7
Changing the location of a weblog . . . . . 9–8
Deleting a weblog . . . . . 9–9

## Chapter 10 DocuShare discussions

About discussions . . . . . 10–2
Adding a discussion . . . . . 10–3
Viewing and changing discussion properties . . . . . 10–4
Viewing the change history . . . . . 10–4
Changing the location of a discussion . . . . . 10–5
Deleting a discussion . . . . . 10–6
Adding a topic to a discussion . . . . . 10–7
Adding replies . . . . . 10–7
Viewing and changing the properties of a topic or reply . . . . . 10–8
Viewing the change history . . . . . 10–8
Changing the location of a topic . . . . . 10–9
Deleting a topic or reply . . . . . 10–10
Viewing and deleting expired topics . . . . . 10–11

## Chapter 11 DocuShare URLs

About URLs . . . . . 11–2
Adding a URL . . . . . 11–3
Viewing and changing URL properties . . . . . 11–4
Viewing the change history . . . . . 11–4
Changing the location of a URL . . . . . 11–5
Deleting a URL . . . . . 11–6

## Chapter 12 DocuShare notifications

About notifications . . . . . 12–2
Adding a notification . . . . . 12–3
Viewing notifications . . . . . 12–4
Creating a recipient list for a notification . . . . . 12–5
Viewing and changing notification properties . . . . . 12–6
Deleting a notification . . . . . 12–7

## Chapter 13 DocuShare content rules

About content rules . . . . . 13–2
Creating a content rule . . . . . 13–3

Viewing content rules . . . . . 13–4
Deleting a content rule . . . . . 13–5

## Chapter 14 DocuShare searches

About searches . . . . . 14–2
Viewing new content on your site . . . . . 14–3
Searching for objects . . . . . 14–4
Search options . . . . . 14–5
Running an advanced search . . . . . 14–6
Using reserved characters in a search . . . . . 14–9
Stop words . . . . . 14–10
Saving a search query . . . . . 14–11
Changing saved query properties . . . . . 14–12
Viewing the change history . . . . . 14–12
Changing the location of a saved query . . . . . 14–13
Deleting a saved query . . . . . 14–14

## Chapter 15 My DocuShare

About My DocuShare . . . . . 15–2
Managing favorites . . . . . 15–3
Using your personal collection . . . . . 15–4
Using your personal calendar . . . . . 15–5
Using your personal trashcan . . . . . 15–6
Viewing your online meetings . . . . . 15–7
Viewing your groups . . . . . 15–7
Viewing your routing tasks . . . . . 15–7

## Chapter 16 Online meetings

About online meetings . . . . . 16–2
Scheduling an online meeting . . . . . 16–3
Launching an online meeting . . . . . 16–5
Joining an online meeting . . . . . 16–6
Deleting an online meeting . . . . . 16–7

## Chapter 17 Routing documents

About routing documents . . . . . 17–2
Routing a document . . . . . 17–3
Setting up a collection for routing documents . . . . . 17–6
Checking the status of routing tasks you assigned . . . . . 17–7
Viewing progress reports . . . . . 17–9
Publishing a new version of your routed document . . . . . 17–10
Viewing the tasks assigned to you . . . . . 17–11
Approving or disapproving a document . . . . . 17–11
Reviewing a document . . . . . 17–12

Acknowledging receipt of a document . . . . . 17–13
Removing a document sent for information . . . . . 17–13
Viewing your deleted tasks . . . . . 17–14
Viewing the routing tasks of a document . . . . . 17–15

**Chapter 18 Scanning documents**

About scanning documents . . . . . 18–2
Scanning documents using scan cover sheets . . . . . 18–3
Creating a scan cover sheet . . . . . 18–3
Scanning a document with a scan cover sheet . . . . . 18–4
Deleting a scan cover sheet . . . . . 18–4
Scanning documents to a temporary scan collection . . . . . 18–5
Saving a scanned document to a collection . . . . . 18–6

**Chapter 19 Archiving content**

About archiving content . . . . . 19–2
Archiving content . . . . . 19–3
Archiving content automatically . . . . . 19–3
Archiving content manually . . . . . 19–3
Restoring archived content . . . . . 19–5

**Chapter 20 FAQs**

Answers to frequently asked questions . . . . . 20–2

**Appendix A WebDAV folders**

Using WebDAV folders . . . . . A–2
Document titles in WebDAV folders . . . . . A–2

**Appendix B DocuShare portal integration**

Accessing DocuShare in a portlet . . . . . B–2

# 1

# Getting started


- Welcome . . . . . 1–2
- Accessing DocuShare . . . . . 1–3
- Understanding DocuShare objects . . . . . 1–5
- Logging in and out . . . . . 1–7
- How to get help . . . . . 1–8
- DocuShare Client applications . . . . . 1–9

# Welcome

The Xerox DocuShare family of products allow you to easily and efficiently manage electronic content using a web browser. Using DocuShare, you can create, organize, and share content, collaborate with other users on projects, search for and retrieve content, and automate work processes.

Based on one core platform, your site can provide the capabilities of one or both products: DocuShare and DocuShare CPX. Key features in the products enable you to:

- Create and maintain your own account and personal work area without the assistance of a web master or site administrator.
- Add and control access to site content.
- Maintain multiple versions of a document, track its revision history, and lock a document to prevent simultaneous editing.
- Collaborate on content using wikis and weblogs.
- Scan paper documents to site locations.
- Route documents for approval or review.
- Create project-oriented areas for managing the content, people, and tasks. (*DocuShare CPX only*)
- Set up content rules to automate a work process. (*DocuShare CPX only*)

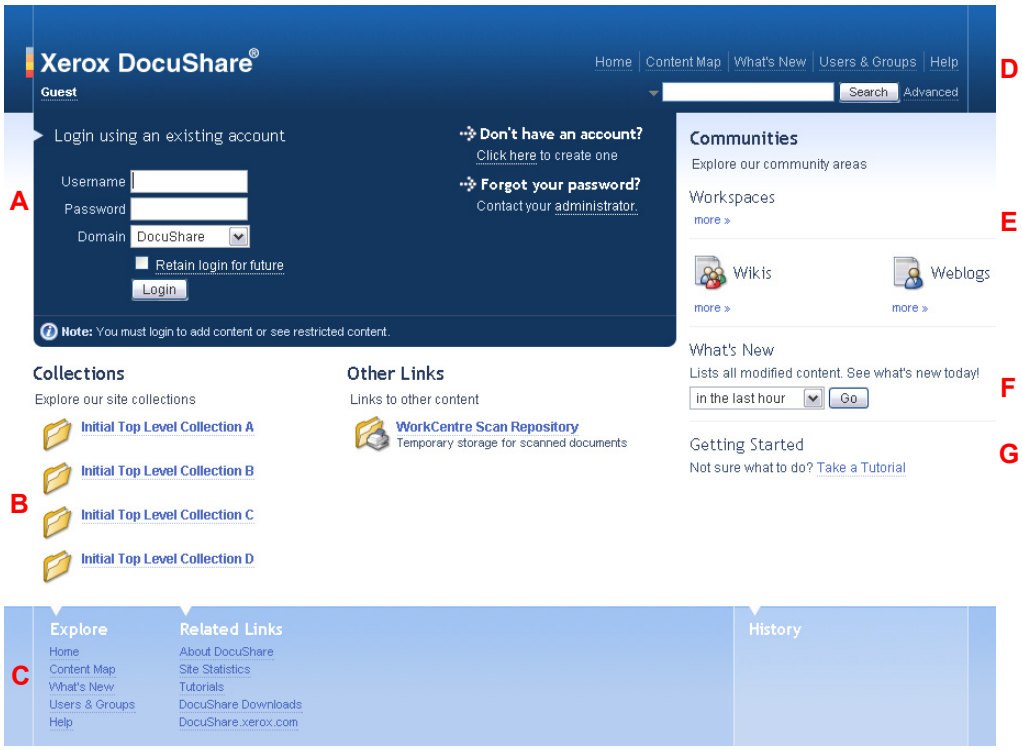
This guide describes how to use the features in both DocuShare and DocuShare CPX. Any feature unique to DocuShare CPX is indicated by the following icon and note:

**Only for DocuShare CPX**

# Accessing DocuShare

You access DocuShare by entering the URL of your DocuShare site in a web browser window. Depending on how your site is set up, you may be required to log in or you see the DocuShare home page. From the site home page you can log in, as well as access the content and features on your site.

Although your administrator can customize your site home page and different browsers may not display site elements the same, your home page should look similar to the example shown below.




The DocuShare home page includes these features:

A—Login area

B—The site's top-level collections, which your administrator sets up

C—Page footer, which includes links to other DocuShare pages and related information and displays your browsing history

D—Navigation bar, which includes links to other DocuShare pages and a search area for running quick searches and accessing advanced search features

E—Access to community areas

F—What's New menu, which you can use to see the content that has been added or changed

G—Help on getting started using DocuShare

## Navigating your site

DocuShare navigation features make it easy to find what you need.

**Navigation bar**—Includes links to pages and features that are used frequently:

- Home—returns to the home page.
- Content Map—provides a hierarchical display of the objects on your site, based on your current location. You can click any object in the Content Map to open it.
- What's New—lists the new and changed objects on your site.
- Users & Groups—provides links to listing, finding, and creating user and group accounts.
- Help—provides access to user guides, tutorials, and software downloads.
- Username—displays your user account properties. Your username displays after you log into DocuShare.
- Logout—logs you out of DocuShare. The link displays after you log in.
- My DocuShare—displays your personal home page, which includes your favorites and a personal collection and calendar. The link displays after you log in.
- My Tasks—shows the routing tasks assigned to you and the tasks you assigned. The link displays after you log in.
- Search area—includes an area for running quick searches as well as a link to the Advanced Search page.

**Page footer**—In addition to including some of the same links shown on the navigation bar, provides links to related information, personal pages, and account information and displays your browsing history.

**Breadcrumbs**—Provide a path from the home page to your current location or list the last few pages you visited. You can click any link in the breadcrumbs to go to the page. For objects that appear in more than one location, multiple breadcrumbs are displayed when you click the triangle under **Location**.

**Location**: Home > Initial Top Level Collection D > My Collection Listing
▼

# Understanding DocuShare objects

You create content on your site by adding different types of DocuShare objects. You organize site content in container objects called collections. On a DocuShare CPX site, you manage the content and resources associated with projects in objects called workspaces. Objects that you can add to collections and workspaces include: documents, calendars, wikis, weblogs, discussions, and URLs. DocuShare identifies each object on a site with a unique handle (for example, Document-37 and Calendar-102). The type and number of objects on your site are dependent on your organization's needs.

Each DocuShare object is indicated by an icon. Table 1–1 shows the current DocuShare icons.

Table 1–1: DocuShare icons

| DocuShare object and its icon | |
|---|---|
| **User**—A registered DocuShare user. | **Group**—One or more DocuShare users, groups, or both. |
| **Collection**—A container for storing DocuShare objects. | **Document**—A document stored on the DocuShare site. The icon can vary, depending on the document's file type. |
| **Workspace**—A shared area for project and team collaboration. (*DocuShare CPX only*) | **Content Rule**—A configurable rule for running an action after a change occurs to a specified object. (*DocuShare CPX only*) |
| **Wiki**—A collaborative web site. | **Weblog**—A simple web site for frequent postings. |
| **Discussion**—An online forum where topics can be posted. | **Topic**—A posting to a discussion. |
| **Calendar**—An online monthly or weekly calendar. | **Event**—A calendar entry. |
| **Mail Message**—An email message. | **Saved Query**—Saved search query terms that can be used for a search. |
| **Notification**—Email notification after a change occurs to a specified object. | **URL**—An Internet address for a web page. |

## Object permissions

Every object on a site has an owner who can control the type of access that users and groups have to it by assigning permissions. Initially, the object's owner is the user who added the object. However, any user with the appropriate permission can change the owner. DocuShare allows you to assign these access permissions to users and groups:

- **Reader** allows the user or group to read the contents of the object and view its associated properties and permissions.
- **Writer** allows the user or group to edit the object's properties and add new objects, including new versions of documents.
- **Manager** allows the user or group to delete the object, and change the object's permissions and owner.

Your DocuShare administrator has full permissions to all of the objects on your site. Access permissions provides a complete explanation of how to assign permissions to objects.

## Object properties

In addition to permissions, every object has a set of properties. For example, the properties for all objects include a title, a description, and an owner. Each object has a number of specific properties. For example, the sort order property is unique to collections and documents have a maximum versions property. Your DocuShare administrator also can create custom properties for use at your site. You can assign property values to objects, which allows you to categorize objects, provide information about objects to other users, and facilitate searches.

# Logging in and out

Your administrator determines the access policies for your site. Therefore, you may be able to browse and view content without logging in (as a guest) or you may be required to log in before you can access any site content.

To log into DocuShare:

1. In a web browser, enter the URL of your DocuShare site.
2. In the Login area, enter your registered username and password in the fields.

   Your password is case-sensitive.
3. In the **Domain** field, select your internal domain name (if applicable).
4. If the **Retain login for future** checkbox appears, click it if you want to remain logged into DocuShare after you close and reopen your browser.

**Note:** The **Retain login for future** checkbox appears if your administrator configured your site to allow users to remain logged in after closing their browser. For DocuShare to save your password, Internet Explorer's **Do not save encrypted pages to disk** option cannot be enabled. You can check the option's setting by selecting **Internet Options** from the **Tools** menu and then clicking the **Advanced** tab.

5. Click **Go**.

   Your username appears on the navigation bar, indicating that you are logged in.

To log out of DocuShare:

1. Do one of the following:
   - Close the browser window.
   - If you selected the **retain login for future** checkbox, click the **Logout** link on the navigation bar.

# How to get help

In addition to this guide, the Help Desk includes other guides and a tutorial. The Documentation page provides user guides for the features available on your site. The Training page includes a User Tutorial, which helps you get started using DocuShare by following a series of step-by-step exercises.

## DocuShare User Group

The DocuShare User Group, DoUG, provides access to additional product information, hints and tips from other user group members, and knowledge base articles. To sign up with the user group, go to http://docushare.xerox.com/doug.

# DocuShare Client applications

The Downloads page on the Help Desk provides several Client applications to extend DocuShare's functionality:

**DocuShare Windows Client**—A Windows-based application that seamlessly integrates DocuShare's document management features within your Windows desktop environment. From your Windows desktop you can easily access DocuShare content, drag and drop documents between DocuShare collections and your local and network drives, and open, edit, and save DocuShare documents from a variety of applications.

**DocuShare Outlook Client**—A Windows-based application that enables you to conveniently manage and share information within Microsoft Outlook. Mapped DocuShare servers and collections appear as mail folders in your Inbox's Folder List. Open a folder to browse the contents of a collection, open documents for editing, and save new versions of documents. You can easily archive and share mail messages and attachments by dragging and dropping them to a collection. When you need to find information quickly, you can perform keyword searches.

**PaperPort Link to DocuShare**—A program link for the popular Nuance PaperPort application that is included with many desktop scanners. The link enables you drag and drop scanned documents from your PaperPort desktop to DocuShare.

# 2

# Users and groups


- About DocuShare accounts . . . . . 2–2
- DocuShare user accounts . . . . . 2–3
- DocuShare group accounts . . . . . 2–9
- Finding and listing DocuShare accounts . . . . . 2–15

# About DocuShare accounts

DocuShare provides two types of accounts: individual user accounts and group accounts. Your administrator determines who can create each type of account on your site. For example, your site might allow a guest (someone who can view public content) to create a user account, but require an administrator to create group accounts.

When a user account is created, either by you or an administrator, it is assigned a **user level**. The user level controls the level of access to site content and functions. One or more of the following user levels are provided when creating a user account:

- **Read-Only**—Allows the user to view content and manage personal content on My DocuShare.
- **DocuShare**—Allows the user to access all DocuShare content management functions.
- **CPX**—Allows the user to access all DocuShare CPX content and process management functions. (*DocuShare CPX only*)

After the user account is created, the user level assigned to the account is indicated by the superscript letters appearing after the username: read-only, DS, or CPX.

**Note:** If your site uses the LDAP (Lightweight Directory Access Protocol) feature to manage user accounts, an administrator creates an account for you. To find out how your site is configured, see your DocuShare administrator.

# DocuShare user accounts

To add and edit content, you must have a DocuShare user account.

## Creating a user account

If your site allows a guest to create accounts, you can create a user account. If account creation is restricted, an administrator will need to create a user account for you.

To create a user account:

1. On the navigation bar, click **Users & Groups**.
2. Click the **Add User** link.
3. On the Add User page, enter the following information:

   **Username**—The name to use to log into DocuShare.

   **Password** and **Password Confirm**—The password to use to log into DocuShare. Your administrator can specify that passwords adhere to a set of rules. If specified, the rules appear on the page.

   Passwords are case-sensitive and must be typed as specified when logging in.

   **Domain**—An organization or other entity on your DocuShare site. This field appears if your site uses the LDAP feature; the menu lists both internal and LDAP domains.

   **User Level**—The level of access to site content and functions.

   **Last Name**—The last name of the user. Users are listed on the DocuShare site by their first and last names.
4. Enter any optional information. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

   The View Properties page for the user account appears.

   If DocuShare was unable to create a new account, a message page appears describing the problem.

## Viewing user account properties

You can view the properties of any DocuShare user account.

To view a user's account properties:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Users** in the **Show** field.
3. From the **User Level** menu, select a single user level or all levels.
4. Do one of the following:
   - To find a specific user account, enter part of the user's first name, last name, or username in the **Search** field. Click the **Go** button.
   - To display all user accounts, click **Show All**.
5. From the displayed list, click the name of the user whose properties you want to view.

   The View Properties page appears, displaying the user's properties. Click a field name for a description of each property.

## Changing your user account properties

You must be logged in as the user whose properties you want to change. You can view, but not change, another user's properties.

To change your user account properties:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Edit** link.
3. Change the properties you want. Click a field name for a description of each property.
4. Click **Apply**.

## Changing your password

You must be logged in as the user whose password you want to change. You cannot change another user's password.

**Note:** If your site uses the LDAP feature, you cannot change your password. Your administrator must change your password on the LDAP server.

To change your current password:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Change Password** link.
3. Enter your current password in the **Old Password** field.
4. Enter your new password in the **New Password** field.

   Your administrator can specify that your password adhere to a set of rules. If specified, the rules appear on the page.
5. Enter your new password in the **New Password Confirm** field.
6. Click **Apply**.

## Changing your username

You must be logged in as the user whose username you want to change. You cannot change another user's username.

**Note:** If your site uses the LDAP feature, you cannot change your username. Your administrator must change your username on the LDAP server.

To change your username:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Change Username** link.
3. Enter your current password in the **Password** field.
4. Enter a new username in the **Username** field.
5. Click **Apply**.

   The View Properties page appears displaying your new username. The new name also appears on the navigation bar.

## Changing your domain

If your site uses the LDAP feature, you can change your domain to an internal domain on the DocuShare server. You must be logged in as the user whose domain you want to change; you cannot change another user's domain.

To change your current domain:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Change Domain** link.
3. Select a new domain from the **Domain** menu.
4. Click **Apply**.

## Viewing your activity history

**Only for DocuShare CPX**

DocuShare keeps track of all user activity on your site, which provides an audit trail of the actions of each user. You can view your site activity only. An administrator can view the activity of all site users.

To view activity history:

1. Click your username on the navigation bar.
2. On the View Properties page, click the **Activity History** link.
3. From the **Activity** menu, select the type of activity you want to view.
4. From the **Object Type** menu, select an object to limit the activity displayed to a specific object type.
5. From the **Show Last** menu, select the number of activity events to display.
6. To display the activity during a specific date range, enter start and end dates.
7. Click **Go**.

   Information about the activity displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

## Changing federation settings

DocuShare federation enables you to search multiple DocuShare sites to easily access content located on several servers. If your site is a member of a DocuShare federation (a **Federation** icon appears at the bottom of a DocuShare page), you must map your user account information to the other member servers that you want to access.

To map your user account:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Federation Settings** link.

   The Federation Settings page lists the servers in your federation.

3. Click the **Edit Mapping** link that appears to the right of the server to which you want to map.

   The Edit Mapping page appears. If you know your username on the server, continue with step 4. To search for your username, go to step 5.

**Note:** If you do not have an account on the server, see the procedure **To create a user account on a federated server** below.

4. To enter your account information, click **Enter manually** and do the following:
   a. Enter your username, password, and domain (if applicable).
   b. Click **Apply**.

   Your username appears on the Federation Settings page.
5. To select your user account from a list, click **Choose from list** and do the following:
   a. Find your account by doing one of the following:
      - Enter part of your first name, last name, or username in the **Search** field and click the **Go** button.
      - Click **Show All** to display all user accounts.
      - Click **Show users with my email address** to display the accounts with your email address.
   b. Select your account.
   c. Enter the password for the account.
   d. Click **Apply**.

   Your username appears on the Federation Settings page.

To create a user account on a federated server:

1. On the Edit Mapping page, click the **Create a new user account on this server** link.

   The Add User page on the server on which you are creating the account appears.

**Note:** If the site does not allow guest access, you cannot create an account.

2. Enter your account information and click **Apply**.
3. Click the browser's **Back** button until you return to the Edit Mapping page on the initial server.
4. Click **Choose from list**.
5. Display your account and select it.
6. Enter your password.
7. Click **Apply**.

   Your username appears on the Federation Settings page.

To remove an account mapping:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Federation Settings** link.

   The Federation Settings page lists the servers in your federation.
3. Click the **Edit Mapping** link that appears to the right of the server whose mapping you want to remove.
4. On the Edit Mapping page, click **No user mapping**.
5. Click **Apply**.

   Your username does not appear next to the server on the Federation Settings page.

## Deleting a user account

Only an administrator can delete an existing user account. Contact your administrator if you want to delete your user account. If you have several user accounts, your administrator can combine any number of the accounts into one account.

# DocuShare group accounts

A group consists of any number of DocuShare users, groups, or both. When your site includes groups, you can more easily manage access to objects by assigning permissions to the group instead of to each user.

## Creating a group

The DocuShare administrator can choose to allow logged-in users to create group accounts or to have group account creation under administrative control. If after logging into DocuShare, you do not see the **Add Group** link on the Users and Groups Registry page, then an administrator will need to create a group for you.

To create a group:

1. On the navigation bar, click **Users & Groups**.
2. Click the **Add Group** link.
3. In the **Title** field, enter a name for the group. The name can contain spaces and punctuation marks, and can be identical to another group name.
4. In the **Domain** field, select a domain name. This field appears if your site uses the LDAP feature; the menu lists both internal and LDAP domains.
5. Enter any optional information. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

6. Click **Apply**.

   The Pick Members for Group page appears.
7. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
8. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
9. In the **Possible Users/Groups** field, select the accounts to add to the group and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
10. In the **Selected Users/Groups** field, select any accounts that you want to remove from the group and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).

11. Click **Update**.

    The group members display on the Members page.

12. To give one or more members Manager permission to the group, click the checkbox next to each member's name and click **Apply**. Manager permission allows the member to change the group's properties and membership.

## Viewing group properties

You can view the properties of any DocuShare group.

To view a group's properties:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the name of the group whose properties you want to view.

   The View Properties page for the group appears. Click a field name for a description of each property.

## Changing group properties

Depending on how the group was set up, either the logged-in owner of the group or a logged-in group member can change the properties of a group.

To change a group's properties:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group whose properties you want to change.

   The View Properties page for that group appears.

5. Click the **Edit** link.
6. Change the properties that you want. Click a field name for a description of each property.
7. Click **Apply**.

## Changing the members of a group

Depending on how the group was set up, either the logged-in owner of the group or a logged-in group member can change the members of the group.

To change a group's members:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group whose members you want to change.

   The View Properties page for that group appears.
5. Click the **Members** link.

   The Members page shows the current group members.
6. To change group members, click the **Change Membership** button.
7. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
8. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
9. In the **Possible Users/Groups** field, select the accounts to add to the group and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
10. In the **Selected Users/Groups** field, select any accounts that you want to remove from the group and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
11. Click **Update**.

    The group members display on the Members page.

## Changing the owner of a group

Only the logged-in owner of the group can change its owner. After changing the group's owner to another user, you will no longer be able to change the group's members and properties, unless you have Manager permission to the group.

To change the owner of a group:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group whose owner you want to change.

   The View Properties page for that group appears.
5. Click the **Edit** link.
6. Click **Change Owner**.

   The Change Owner page appears.
7. Do one of the following:
   - To find a specific user account, enter part of the user's first name, last name, or username in the **Search** field. Click the **Go** button.
   - To display all user accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
8. Select a name from the **New Owner** field.
9. In the **Add Owner to Group** field, click **Yes** to add the new owner to the group.
10. Click **Update Owner**.

## Changing the domain of a group

If your site uses the LDAP feature, you can change a group's domain to an internal domain on the DocuShare server. You must be the logged-in owner of the group to change its domain.

**Note:** Changing the group's domain does not change a group member's domain, if one is used.

To change a group's domain:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.

3. Do one of the following:
   - To find a specific group account, enter any part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group whose domain you want to change.

   The View Properties page for that group appears.
5. Click the **Change Domain** link.
6. Select a new domain from the **Domain** menu.
7. Click **Apply**.

## Sending mail to group members

To easily communicate with a DocuShare group, you can send an email message to the group's members. The message is sent to each member whose user properties include an email address. To send email, your web browser must be correctly configured with a mail client, such as Microsoft Outlook or Netscape Communicator.

To send email to the members of a group:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group that you want to send an email message to.

   The View Properties page for that group appears.
5. Click the **Email** link.
6. To write your message, click the **here** link.

   Your browser launches an untitled message window with each group member's email address entered in the **To** field.
7. Compose your message and click **Send** to email the message to the members of the group.

## Viewing the change history

**Only for DocuShare CPX**

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects.

To view the change history:

1. Locate the group whose change history you want to view.
2. Click the group's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

## Deleting a group

You can delete a group if you are the logged-in owner of the group.

To delete a group:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select **Groups** in the **Show** field.
3. Do one of the following:
   - To find a specific group account, enter any part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
4. From the displayed list, click the group that you want to delete.

   The View Properties page for that group appears.
5. At the bottom of the page, click the **Delete** button.

   The Confirm Delete page appears.
6. Click **Delete** to remove the group from your site.

# Finding and listing DocuShare accounts

From the List page, you can quickly search the users and groups registry to determine whether or not a user or group has an account on the DocuShare site. You also can list all of the user and group accounts registered on the site.

To search for a user or group:

1. On the navigation bar, click **Users & Groups**.
2. On the List page, select the type of account you want to find in the **Show** field.
3. From the **User Level** menu, select a single user level or all levels.
4. In the **Search** field, enter a complete name or part of a name.
5. Click **Go**.

   The search results display, listing the users, groups, or both who match the search text.

To list the accounts on your site:

1. On the List page, select the type of account you want to list in the **Show** field.
2. Click **Show All**.

   The list of all registered accounts displays.

**Only for DocuShare CPX**

When displaying the list of accounts, the List page enables you to see which users are logged into DocuShare. The user icon next to the user's name indicates whether or not the user is logged in; the icon is grayed when the user is not logged in.

# 3

# DocuShare collections


- About collections . . . . . 3–2
- Adding a collection . . . . . 3–3
- Viewing and changing collection properties . . . . . 3–4
- Changing the location of a collection . . . . . 3–5
- Deleting a collection . . . . . 3–6
- Editing multiple objects in a collection . . . . . 3–7

# About collections

Your DocuShare site consists of any number of repositories, called collections, in which you store documents and other objects. The administrator determines which initial set of collections appears on the DocuShare home page. As a registered user, you can add collections to your site.

# Adding a collection

You can add a collection to another collection or to a workspace (*DocuShare CPX only*) if you are logged in and have Writer permission to the container.

To add a collection:

1. Navigate to and open the container to which you want to add a collection.
2. From the **Add** menu, select **Collection**.

   The Add Collection page appears.
3. In the **Title** field, enter a name for the collection. The name should be short, but descriptive, and can contain spaces and punctuation marks.
4. Enter any optional information. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

   The collection is added to the container.

To change the collection's permissions, see Access permissions.

# Viewing and changing collection properties

If you are logged in and have Reader permission to a collection, you can view its properties. You can change a collection's properties if you are the logged-in owner of the collection or a logged-in user with Writer permission to it.

To view and change a collection's properties:

1. Locate the collection whose properties you want to view and change.
2. Click the collection's **Properties** icon.
3. On the View Properties page, click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

## Viewing the change history

**Only for DocuShare CPX**

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. You can view the changes to any object to which you have Reader permission.

To view the change history:

1. Locate the collection whose change history you want to view.
2. Click the collection's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

# Changing the location of a collection

You can move a collection to another container or have the collection appear in several containers on your site. Although a collection can appear in several containers, there is only one copy of it, which saves space on your DocuShare site.

To change a collection's location, you must be logged in and have Writer permission to both the collection and the new container.

**Note:** You can also use the **Copy**, **Cut**, and **Paste** commands from the **Edit Selected** menu to change the location of a collection. See Editing multiple objects in a collection on page 3–7.

To change a collection's location:

1. Locate the collection whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears next to the collection's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the collection's title. On the Properties page for the collection, click the **Locations** link.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible containers in alphabetical order or select **Handle** to display the possible containers in numerical order.
4. Do one of the following:
   - To find specific containers, enter any part of a container title in the **Search** field. Click the **Go** button.
   - To display all containers, click **Show All**.
   - To display your favorite containers, click **Show Favorites**.
5. In the **Possible Locations** field, select the container(s) in which you want the collection to appear and click the **Add** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any containers in which you do not want the collection to appear and click the **Remove** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).

**Note:** Make sure at least one container appears in the **Selected Locations** field. Otherwise, the collection will become orphaned, which means it will not appear in any container.

7. Click **Update Locations**.

# Deleting a collection

You can delete a collection if you are the logged-in owner of the collection or have Manager permission to it. If the collection contains other objects, you can choose to delete the collection only or the collection and its contents. To delete the collection and its contents, you must be the owner of the objects in the collection or have Manager permission to them.

After deleting a collection, it goes to your personal trashcan on My DocuShare. You can restore an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See My DocuShare for more information.

**Note:** If you delete a collection, but not its contents, and the objects are not located in another collection, they become orphaned. You are unable to access orphaned objects from a collection. Your administrator can relocate orphaned objects in a collection so you can access them again.

To delete a collection:

1. Locate the collection that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the collection's title. From the **Edit Selected** menu, select **Delete**.
   - From the collection's **More Actions** menu, select **Delete**.

   The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the collection, then you do not have Manager permission to the object and cannot delete it.

3. From the **For collections, delete** menu, do one of the following:
   - Select **Collection and Contents** to delete the collection and all of the objects in it.
   - Select **Collection Only** to delete the collection, but not its contents.
4. Click **Delete** to remove the collection from your site.

# Editing multiple objects in a collection

When viewing an open collection, you can use the **Edit Selected** menu to perform a variety of tasks on one or more objects. The menu includes these commands:

- **Add to Favorites**—Add the object to **Favorites** on My DocuShare.
- **Archive** and **Restore**—Move the object to and retrieve the object from an Archive Server (commands appear if your site uses an Archive Server). See Archiving content for more information.
- **Change Location**—Add the object to another location.
- **Change Owner**—Change the owner of the object.
- **Copy**—Copy a reference of the object to the clipboard. The clipboard can contain a maximum of 100 objects.
- **Copy Shortcuts**—Copy a reference of the object to the clipboard so it can be pasted to a shortcuts portlet on a workspace. (*DocuShare CPX only*)
- **Cut**—Cut the object to the clipboard. The clipboard can contain a maximum of 100 objects.
- **Paste**—Paste the object from the clipboard.
- **Delete**—Remove the object from your site.
- **Rename**—Change the title of the object.
- **Route**—Send the document to users for approval, review, or information. See Routing documents for more information.

To edit multiple collection objects:

1. Navigate to and open the collection.
2. Do one of the following:
   - To edit some of the objects, click the checkbox next to the objects you want.
   - To edit all of the objects, click the checkbox to the left of the **Type** column heading.
3. From the **Edit Selected** menu, select the command you want.

   A confirm window appears.
4. Click **Confirm** to continue. Depending on which command you selected, additional pages may appear.

**Note:** When using the **Change Location** command, if an object appears in more than one collection, only the current collection is listed in the **Selected Locations** field.

## Using Copy, Cut, and Paste to change the location of an object

To copy or cut objects:

1. Locate the object that you want to copy or cut.
2. Click the checkbox next to the object.
3. From the **Edit Selected** menu, select either **Copy** or **Cut**.

   A confirm window appears.
4. Choose whether or not to remove any objects from the clipboard *before* the copy or cut.
5. Click **Confirm**.

**Note:** When using the **Cut** command, the object is grayed until you **Paste** it to another container.

6. Open the container in which you want to paste the object.
7. From the **Edit Selected** menu, select **Paste**.

   A confirm window appears.
8. Choose whether or not to remove any objects from the clipboard *after* the paste.
9. Click **Confirm**.

   The object appears in the container.

# 4

# DocuShare documents


- About documents . . . . . 4–2
- Adding a document . . . . . 4–3
- Viewing a document . . . . . 4–4
- Finding duplicate documents . . . . . 4–6
- Editing a document . . . . . 4–7
- Adding a new version of a document . . . . . 4–9
- Managing document versions . . . . . 4–10
- Locking and unlocking a document . . . . . 4–12
- Exporting a document . . . . . 4–13
- Adding comments to a document . . . . . 4–14
- Viewing and changing document properties . . . . . 4–15
- Changing the location of a document . . . . . 4–16
- Deleting a document . . . . . 4–17

# About documents

Using DocuShare, you can store, access, and manage documents created in a variety of popular formats. You add documents to DocuShare by uploading documents from your computer or a network drive or by scanning paper documents. With the documents stored on DocuShare, users connected to the network can use their browser to search for, view, edit, and download a document.

For document management, DocuShare supports version control and document locking. By default, DocuShare saves four versions of a document; you can change the number of versions DocuShare saves on a per-document basis. In addition, you can change a document's preferred version, which is the version that opens when users view, edit, and route the document. By default, a document's preferred version is its latest version.

# Adding a document

You add a document to a collection or workspace (*DocuShare CPX only*) to make it available to others for viewing or collaborative work. When adding a document by uploading a document now, the document is added immediately to DocuShare. When adding a document by scanning a document or uploading a document later, a **placeholder** document is added. The placeholder does not contain any content; you add content to the placeholder by scanning a document using a cover sheet or by uploading a new version.

To add a document, you must be logged in and have Writer permission to the container.

To add a document:

1. Navigate to and open the container to which you want to add the document.
2. From the **Add** menu, select **Document**.

   The Add Document page appears.
3. In the **Add Document By** field, select one of the following:
   - **Uploading a document now** to upload a document immediately.
   - **Scanning a document using a cover sheet** to scan a paper document.
   - **Uploading a document later** to upload a document at a later time.
4. If you are uploading a document now, enter the complete path and filename of the document in the **Filename** field or click the **Browse** button to navigate to and select the document.

   If you enter the path and filename of a document that does not appear on the drive, DocuShare uploads an empty document.
5. Enter the following information:

   **Title**—The title of the document. The title can contain spaces and punctuation marks.

   **Max Versions**—The maximum number of versions to save. When a new version of a document is saved to DocuShare, the oldest version is deleted, unless it is the preferred version.
6. Enter any optional information. Click a field name for a description of each property.
7. Click **Apply**.

   If you are uploading a document, it is added to the container. If you are scanning a document, a cover sheet appears. Print the cover sheet. For information on how to use the cover sheet, see Scanning a document with a scan cover sheet on page 18–4. If you are uploading a document later, you can add the document content by adding a new version. See Adding a new version of a document on page 4–9.

   If you chose to route the document, a Routing Slip appears. For information on how to use the Routing Slip, see Routing documents.

# Viewing a document

When opening a document to view it, you choose to either open or save (download) the document. The download copies the document and keeps the original document on DocuShare.

Your browser controls how a document is displayed. By design, browsers are able to handle several types of documents and files, such as HTML, GIF, and JPEG. However, for some documents, such as Microsoft Word and Excel, your browser launches a **helper application** (**viewer**) to run or display the document either outside or within the browser window. To play multimedia files, the browser uses a **plug-in**, which opens the file within the browser window.

Your browser is preconfigured to use specific helper applications and plug-ins. Generally, if you try to open a document or file that your browser does not recognize, it displays a window that guides you in finding the application to use for that type of file.

Unless access to a document is restricted, you can view any document on your site.

To view a document:

1. Locate the document that you want to view.
2. Click the document's title.

   A window appears allowing you to open or download the document.
3. To return to the container page after opening the document, do one of the following:
   - If the document opened in a separate window, select **Exit** from the **File** menu.
   - If the document opened within the browser window, click the browser's **Back** button.

**Note:** If you click the X in the top-right corner of the browser or select **Close** from the **File** menu, your browser closes and you lose your connection to the DocuShare site.

## Viewing a document and its properties

For PDF documents, a variety of image documents (gif, jpeg, png, tiff), and other document formats, you can view the document content while viewing and editing the document's properties.

**Note:** To view Microsoft Word and PowerPoint documents, you should use Internet Explorer. Also, make sure your Folder Options are configured to open each document type within the same browser window.

To view a document and its properties:

1. Locate the document that you want to view.
2. From the document's **More Actions** menu, select **View Document & Properties**.

   Both the document and its properties display in a separate window.

3. Change any of the properties and click **Update**.
4. Click **Close** to close the window.

## Viewing an HTML rendition of a document

DocuShare provides an HTML conversion feature that lets you view supported document types in HTML format. This feature eliminates the need to configure your browser to display certain document types.

**Note:** The HTML conversion feature cannot convert documents that contain encrypted information.

To view an HTML rendition of a document:

1. Locate the document that you want to view.
2. From the document's **More Actions** menu, select **View in HTML**.

   DocuShare converts the document to HTML and displays the document.
3. Click the browser's **Back** button to return to the container page.

## Viewing a PDF rendition of a document

**Only for DocuShare CPX**

DocuShare provides a PDF conversion feature that lets you view supported document types in PDF format. This feature eliminates the need to configure your browser to display certain document types.

**Note:** The PDF conversion feature cannot convert documents that contain encrypted information. You must have Adobe® Reader® installed on your computer.

To view a PDF rendition of a document:

1. Locate the document that you want to view.
2. From the document's **More Actions** menu, select **View in PDF**.

   DocuShare converts the document to PDF and displays the document.

# Finding duplicate documents

**Only for DocuShare CPX**

DocuShare provides a finder feature that enables you to find documents with identical content, regardless of their format.

To find duplicate documents:

1. Locate the document that you want to check for duplicates.
2. From the document's **More Actions** menu, select **Find Duplicates**.

   Any documents with the same content display.

# Editing a document

DocuShare supports the complete development cycle of a document, allowing users to collaborate on a project. Document check out and locking ensures that only one user at a time edits a document. Version control maintains a user-specified number of document versions.

To edit a document and create a new version, you must be either the logged-in owner of the document or a logged-in user with Writer permission to it. In addition, the document's **Add Versions** property must be set to **Allowed** (default setting).

**Note:** If DocuShare Windows Client is installed on your computer and you enabled the **Handle checkout from web browser** property in the DocuShare Client Properties window, the DocuShare Client Checkin Wizard displays after you edit and save the document. When using this feature, make sure DocuShare's URL in the browser is the same as the server's address in Windows Client. To check the server's address, right-click the server name and select **Properties**.

To edit a document:

1. Locate the document that you want to edit.
2. Click the document's **Check Out** icon.

   A window appears allowing you to open or download the document.
3. Edit the document.
4. Do one of the following:
   - If the document opened in the browser, click the **Back** button. Click **Yes** to save your edits.
   - If the document opened in its native editor, select **Save As** from the **File** menu.
5. In the **Save As** window, save the document to a location on your local drive.

   Do not change the name of the document.
6. On the container page, click the document's **Upload a New Version** icon.

   The Add Version page appears.
7. Click the **Browse** button.
8. Navigate to the location on your local drive in which you saved the edited document, select it, and click **Open**.

   The path to the document appears in the **Filename** field.
9. In the **Title** field, you can change the document title. By default, the new version is assigned the original document title.
10. Optionally, enter any comments in the **Version Comments** field.
11. If you locked the document, choose whether or not you want to unlock the document after adding the new version in the **Unlock Document** field.

12. When a document version other than the latest is the preferred version, you can click **Yes** in the **Make This The Preferred Version** field to set this version as the preferred one. Otherwise, click **No** to not change the preferred version.
13. Click **Apply**.

# Adding a new version of a document

You can add a new version of a document by uploading a document from a folder on your local drive or a network drive. To add a new version, you must either be the logged-in owner of the document or have Writer permission to it.

To add a new version of a document:

1. Locate the document that you want to update with a new version.
2. Click the document's **Upload a New Version** icon.

   The Add Version page appears.
3. Click the **Browse** button.
4. Navigate to the location that contains the document you want to add as a new version, select it, and click **Open**.

   The path to the document appears in the **Filename** field.
5. In the **Title** field, you can change the document title. By default, the new version is assigned the original document title.
6. Optionally, enter any comments in the **Version Comments** field.
7. If the previous version of the document was locked, the **Unlock Document** field appears. Click **No** if you do not want to unlock the document after adding the new version.
8. When a document version other than the latest is the preferred version, you can click **Yes** in the **Make This The Preferred Version** field to set this version as the preferred one. Otherwise, click **No** to not change the preferred version.
9. Click **Apply**.

# Managing document versions

DocuShare's version control feature enables you to maintain a record of a document's history. For each version DocuShare saves, you can view the content, the date and time the version was added, the user who added the version, and any user-provided comment. You can also view and edit each version's properties and permissions, and route individual versions.

By default, DocuShare saves four versions of a document. You can change the default setting by changing the document's **Max Versions** property. See Viewing and changing document properties on page 4–15.

## Viewing document versions

To view a document's version history:

1. Locate the document whose version history you want to view.
2. Click the document's **Properties** icon.

   The View Properties page appears.
3. Click the **Version History** link.

   The page displays all saved versions of the document.
4. To view a specific version of the document, click its type or version number.
5. To return to the Version History page, do one of the following:
   - If the document opened in a separate window, select **Exit** from the **File** menu.
   - If the document opened within the browser window, click the browser's **Back** button.

## Changing the preferred version

By default, a document's preferred version is the latest version. When there is more than one version of a document, you can change the document's preferred version. This is the version of the document that opens when users view, edit, and route the document. However, users can route a specific document version from the document's Version History page.

DocuShare always saves the preferred version, regardless of the number of **Max Versions** specified.

To change a document's preferred version:

1. Display a document's Version History page.
2. Click **Change Preferred Version**.

   Radio buttons display next to each version and the **Use Latest Version** option appears.

3. Do one of the following:
   - To select one of the existing versions as the preferred version, click the radio button next to the version you want.
   - To always have the latest version of the document be the preferred version, click the radio button next to **Use Latest Version**.
4. Click **Apply**.

## Viewing the renditions of a version

Each version of a document can consist of a number of renditions. A rendition is the version's display format, such as Microsoft Word, Adobe PDF, or HTML, and can be comprised of content files. For example, an HTML rendition of a particular document version would consist of the HTML file and several image files if the rendition contained graphics.

To view a version's renditions:

1. Display a document's Version History page.
2. To view the version renditions, click **Show Renditions**.

   The version renditions display and, if a rendition contains content files, those files display.
3. You can click a rendition or a content file to view it.
4. Click **Hide Renditions** to not view the renditions.

## Viewing and changing version properties

If you are logged in and have Reader permission to a version, you can view its properties. You can change a version's properties if you are the logged-in owner of the version or a logged-in user with Writer permission to the version.

To view and change a version's properties:

1. Display a document's Version History page.
2. Click the document version's **Properties** icon.

   The View Properties page appears.
3. Click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.
5. Click **Apply**.

To change a version's permissions, see Access permissions.

# Locking and unlocking a document

You can lock a document when you want to keep other users from editing it. To lock a document, you must be the logged-in owner of the document or a logged-in user with Writer permission to it.

To allow users to edit a locked document, you need to unlock the document. To unlock a document, you must be the logged-in owner of the document or a logged-in user with Writer permission to it. A document is locked if a **Lock** icon appears to the left of the document's title.

To lock a document:

1. Locate the document that you want to lock.
2. From the document's **More Actions** menu, select **Lock**.

   A **Lock** icon appears to the left of the document title. Users can view the document, but they cannot edit it.

To unlock a locked document:

1. Locate the document that you want to unlock.
2. From the document's **More Actions** menu, select **Unlock**.

   A **Lock** icon no longer appears to the left of the document's title. Users can now edit the document.

# Exporting a document

**Only for DocuShare CPX**

Your administrator can set up locations on external servers to which you can export documents. You can export a single document or several documents at a time.

To export a document:

1. Locate the document that you want to export.
2. Click the checkbox that appears next to the document's title.
3. From the **Edit Selected** menu, select **Export Document**.

   The Confirm Export Document page appears.
4. In the **Location** field, select the external location for the document.
5. Click the **Confirm** button.

# Adding comments to a document

You can post comments on a document to maintain an informal commentary on it. For instance, when co-authoring a document, you can add helpful comments for the other document authors.

Any logged-in user with Reader permission to a document can post comments on it.

To post a comment on a document:

1. Locate the document on which you want to post a comment.
2. Click the document's **Comments** icon.
3. If the are current comments on the document, click the **Add a comment** link.

   The Add Comments page appears.
4. In the **Title** field, enter a name for the comment.
5. In the **Description** field, enter the comment text.
6. Click **Apply**.

   You can view the comments on a document by clicking its **Comments** icon. To edit a comment, click the comment's **Edit** icon.

# Viewing and changing document properties

If you are logged in and have Reader permission to a document, you can view its properties. You can change a document's properties if you are the logged-in owner of the document or a logged-in user with Writer permission to the it.

To view and change a document's properties:

1. Locate the document whose properties you want to view and change.
2. Click the document's **Properties** icon.
3. On the View Properties page, click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

## Viewing the change history

**Only for DocuShare CPX**

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. You can view the changes to any object to which you have Reader permission.

To view the change history:

1. Locate the document whose change history you want to view.
2. Click the document's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

# Changing the location of a document

You can move a document to another container or have the document appear in several containers on your site. Moving a document eliminates the need to delete the document and then upload it again. Although a document can appear in several containers, there is only one copy of it, which saves space on your DocuShare site.

To change a document's location, you must be logged in and have Reader permission to the document and Writer permission to the new container.

**Note:** You can also use the **Copy**, **Cut**, and **Paste** commands from the **Edit Selected** menu to change the location of a document. See Editing multiple objects in a collection on page 3–7.

To change a document's location:

1. Locate the document that you want to move.
2. Do one of the following:
   - Click the checkbox that appears next to the document's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the document's title. On the View Properties page, click the **Locations** link.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible containers in alphabetical order or select **Handle** to display the possible containers in numerical order.
4. Do one of the following:
   - To find specific containers, enter any part of a container title in the **Search** field and click **Go**.
   - To display all containers, click **Show All**.
   - To display your favorite containers, click **Show Favorites**.
5. In the **Possible Locations** field, select the container(s) in which you want the document to appear and click the **Add** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any containers in which you do not want the document to appear and click the **Remove** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).

**Note:** Make sure at least one container appears in the **Selected Locations** field. Otherwise, the document will become orphaned, which means it will not appear in any container.

7. Click **Update Locations**.

# Deleting a document

You can delete a document if you are the logged-in owner of the document or a logged-in user with Manager permission to it.

After deleting a document, it goes to your personal trashcan on My DocuShare. You can restore an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See My DocuShare for more information.

To delete a document:

1. Locate the document that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the document's title. From the **Edit Selected** menu, select **Delete**.
   - From the document's **More Actions** menu, select **Delete**.

   The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the document, then you do not have Manager permission to the object and cannot delete it.

3. Click **Delete** to remove the document from your site.

# 5

# Access permissions


- About access permissions . . . . . 5–2
- Viewing the access permissions of an object. . . . . 5–3
- Changing the access permissions of an object . . . . . 5–4
- Changing the owner of an object . . . . . 5–5
- Applying permissions to the objects in a container . . . . . 5–6
- Applying permissions to a document and its versions . . . . . 5–7

# About access permissions

Every DocuShare object has a set of associated permissions called its **access list**. Permissions are the access rights that a defined set of users and groups has to view, delete, or change a DocuShare object. The object's owner or any user with Manager permission to the object can assign and change the permissions.

As the owner of the DocuShare objects that you add to your site, you can control the type of access users and groups have to those objects. When you add an object to a container, you set the object's initial permissions. At any time you can change the users and groups who have access to the object and the type of access each user or group has.

DocuShare provides the following access permissions that you can assign to users and groups:

- **Reader** allows the user or group to read the contents of the object and view its associated properties and permissions.
- **Writer** allows the user or group to edit the object's properties and add new objects, including new versions of documents.
- **Manager** allows the user or group to delete the object, and change the object's access permissions and owner.

In addition, you can control who can see an object in a search results list.

By default, colored key icons appear next to objects indicating who in addition to the owner can access the objects. (*DocuShare CPX only*)

Table 5–1: Access permission icons

| Access permission icon and its description | |
|---|---|
| | **Green key**—Indicates that the object can be accessed by all users, all groups, and the site administrator. |
| | **Yellow key**—Indicates that the object can be accessed by all groups and the site administrator. |
| | **Red key**—Indicates that the object can be accessed by the site administrator only. |

# Viewing the access permissions of an object

If you have Reader permission to an object, you can view the its access permissions.

To view an object's access permissions:

1. Locate the object whose permissions you want to view.
2. Do one of the following:
   - From the object's **More Actions** menu, select **Permissions**.
   - If visible, click the **key** icon that appears to the right of the object's title. (*DocuShare CPX only*)

   The Permissions page displays the users and groups in the access list and the permissions each account is assigned.

# Changing the access permissions of an object

You can change an object's access permissions if you are the logged-in owner of the object or a logged-in user with Manager permission to the object.

To change an object's access permissions:

1. Locate the object whose permissions you want to change.
2. Do one of the following:
   - From the object's **More Actions** menu, select **Permissions**.
   - If visible, click the **key** icon that appears to the right of the object's title. (*DocuShare CPX only*)

   The Permissions page for the object appears.
3. For **Search Available To**, do one of the following:
   - Click **Anyone** to allow guests and users to view the object in a search results list.
   - Click **Access List Only** to allow only those accounts in the object's access list that have at least Reader permission to see the object in a search results list.
4. If you want to change the list of users and groups who have access to the object, click the **Change Access List** button.

   The Change Access List page appears.
5. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
6. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
7. In the **Possible Users/Groups** field, select the accounts to add to the access list and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
8. In the **Selected Users/Groups** field, select any accounts that you want to remove from the access list and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
9. Click **Update Access List**.

   The Permissions page appears, displaying the new access list.
10. Check the permission boxes you want for each user and group displayed in the access list.
11. Click **Apply**.

# Changing the owner of an object

The default owner of an object is the user who initially created the object. You can change an object's owner if you are the logged-in owner of the object or a logged-in user with Manager permission to the object.

**Note:** When you change the owner of a container, only that object's owner is changed; the owners of the container's objects are not changed.

To change the owner of an object:

1. Locate the object whose owner you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the object's title. From the **Edit Selected** menu, select **Change Owner**. On the confirmation page, click **Confirm**.
   - From the object's **More Actions** menu, select **Permissions**. On the Permissions page, click the **Change Owner** button.
   - If visible, click the **key** icon that appears to the right of the object's title. On the Permissions page, click the **Change Owner** button. (*DocuShare CPX only*)

   The Change Owner page appears.
3. Do one of the following:
   - To find a specific user account, enter part of the user's first name, last name, or username in the **Search** field. Click the **Go** button.
   - To display all user accounts, click **Show All**.
   - To display your favorite user accounts, click **Show Favorites**.
4. Select a username from the **New Owner** field.
5. Click **Update Owner**.

   The Permissions page for the object appears, displaying the name of the new owner at the top of the access list. The new owner has Reader, Writer, and Manager permissions.

   The name of the previous owner remains in the access list.

# Applying permissions to the objects in a container

When you change the access permissions of a container that includes objects, you can choose how to apply the container's permissions to its contents. You can choose to apply all of the permissions or only the changed permissions to either the container or the container and its contents.

You can change a container's access permissions if you are the logged-in owner of the container or a logged-in user with Manager permission to it.

To apply a container's access permission to the objects in it:

1. Locate the container whose permissions you want to change.
2. Do one of the following:
   - From the container's **More Actions** menu, select **Permissions**.
   - If visible, click the **key** icon that appears to the right of the container's title. (*DocuShare CPX only*)

   The Permissions page for the container appears.
3. Make the changes you want to the access list.
4. For **Options**, select one of the following:
   - **Apply all permissions to**—Assigns all of the access permissions.
   - **Apply only changes to**—Assigns only the changed access permissions.
5. Select one of the following:
   - **This container only**—Applies the permissions to the container only. The permissions of the container's objects are not changed.
   - **This container and its objects, including same objects that appear in other containers**—Applies the permissions to the container and the objects in it. The permissions of the same objects that appear in other containers also are changed.
   - **This container and its objects, *excluding* same objects that appear in other containers**—Applies the permissions to the container and the objects in it. The permissions of the same objects that appear in other containers are **not** changed.
6. Click **Apply**.

**Note:** When applying the permissions to a container *and its objects*, the change occurs in the background. You can check the status of the background job on the information bar at the top of the Permissions page. For details on the job and to delete the job from the queue, click the Job ID number displayed on the information bar. In addition, you can access your background jobs from My DocuShare.

# Applying permissions to a document and its versions

Since each version of a document has its own access list, when you change a document's access permissions you can choose how you want to apply the changes to the document's versions. You can change a document's access permissions if you are the logged-in owner of the document or a logged-in user with Manager permission to it.

To apply a document's access permission to its versions:

1. Locate the document whose permissions you want to change.
2. Do one of the following:
   - From the document's **More Actions** menu, select **Permissions**.
   - If visible, click the **key** icon that appears to the right of the document's title. (*DocuShare CPX only*)

   The Permissions page for the document appears.
3. Make the changes you want to the access list.
4. For **Apply all permissions to**, select one of the following:
   - **This document and its versions**—Assigns the changed permissions to the document and all of its versions.
   - **This document only**—Assigns the changed permissions to the document only. The document and its versions will have different access permissions.
5. Click **Apply**.

# 6

# DocuShare calendars


- About calendars . . . . . 6–2
- Adding a calendar . . . . . 6–3
- Changing the calendar view . . . . . 6–4
- Viewing and changing calendar properties . . . . . 6–5
- Changing the location of a calendar . . . . . 6–6
- Deleting a calendar . . . . . 6–7
- Adding an event to a calendar . . . . . 6–8
- Viewing and changing calendar event properties . . . . . 6–9
- Changing the location of a calendar event . . . . . 6–10
- Deleting a calendar event . . . . . 6–11

# About calendars

You can add a calendar to your site to keep track of your appointments, meetings, and other activities. If you and a group of co-workers are responsible for a project, you can share a calendar to manage the tasks and schedules.

The entries you add to a calendar are called events. An event can occur all day or during a specified time period. In addition, an event can occur once or repeatedly, such as a weekly staff meeting or a class.

You can display a calendar in any of the following views:

- **Month view**—Displays an entire month with the current day highlighted. From the current month, you can click a link for the previous month and the next month. You can also display calendars for previous and following years.

  The start time and title of each calendar event is shown on the date to which it was added.

- **Week view**—Displays an entire week with the current day highlighted. From the current week, you can click a link for the previous week and the next week. You can also display calendars for previous and following years.

  The duration, title, and owner of each event is shown on the date to which it was added.

- **Day view**—Displays the current day. From the current day, you can click a link for the previous day and the next day. You can also display a day from another month or year.

  The day view shows the duration, title, and owner of each event added to the date.

# Adding a calendar

You can add a calendar to a collection or workspace (*DocuShare CPX only*) if you are logged in and have Writer permission to the container.

To add a calendar:

1. Navigate to and open the container to which you want to add a calendar.
2. From the **Add** menu, select **Calendar**.

   The Add Calendar page appears.
3. In the **Title** field, enter a name for the calendar. The name should be short, but descriptive, and can contain spaces and punctuation marks.
4. Enter any optional information. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

   The calendar is added to the container.

To change the calendar's permissions, see Access permissions.

# Changing the calendar view

When viewing a calendar, you can change among the three views.

To change the calendar view:

1. Locate the calendar.
2. From the **View** menu, select either **Month View**, **Week View**, or **Day View**.

# Viewing and changing calendar properties

If you are logged in and have Reader permission to a calendar, you can view its properties. You can change a calendar's properties if you are the logged-in owner of the calendar or a logged-in user with Writer permission to it.

To view and change a calendar's properties:

1. Locate the calendar whose properties you want to view and change.
2. Click the calendar's **Properties** icon.
3. On the View Properties page, click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

## Viewing the change history

**Only for DocuShare CPX**

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. You can view the changes to any object to which you have Reader permission.

To view the change history:

1. Locate the calendar whose change history you want to view.
2. Click the calendar's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

# Changing the location of a calendar

You can move a calendar to another container or have the calendar appear in several containers on your site. Although a calendar can appear in several containers, there is only one copy of it, which saves space on your DocuShare site.

To change a calendar's location, you must be logged in and have Writer permission to both the calendar and the new container.

**Note:** You can also use the **Copy**, **Cut**, and **Paste** commands from the **Edit Selected** menu to change the location of a calendar. See Editing multiple objects in a collection on page 3–7.

To change a calendar's location:

1. Locate the calendar whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears next to the calendar's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the calendar's title. On the View Properties page for the calendar, click the **Locations** link.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible containers in alphabetical order or select **Handle** to display the possible containers in numerical order.
4. Do one of the following:
   - To find specific containers, enter any part of a container title in the **Search** field. Click the **Go** button.
   - To display all containers, click **Show All**.
   - To display your favorite containers, click **Show Favorites**.
5. In the **Possible Locations** field, select the container(s) in which you want the calendar to appear and click the **Add** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any containers in which you do not want the calendar to appear and click the **Remove** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).

**Note:** Make sure at least one container appears in the **Selected Locations** field. Otherwise, the calendar will become orphaned, which means it will not appear in any container.

7. Click **Update Locations**.

# Deleting a calendar

You can delete a calendar if you are the logged-in owner of the calendar or a logged-in user with Manager permission to it. When you delete a calendar, all of the events in it are also deleted.

After deleting a calendar, it goes to your personal trashcan on My DocuShare. You can restore an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See My DocuShare for more information.

To delete a calendar:

1. Locate the calendar that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the calendar's title. From the **Edit Selected** menu, select **Delete**.
   - From the calendar's **More Actions** menu, select **Delete**.

   The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the calendar, then you do not have Manager permission to the object and cannot delete it.

3. Click **Delete** to remove the calendar from your site.

# Adding an event to a calendar

You can add an event to a calendar if you are logged in and have Writer permission to the calendar. You can set the event so that it occurs on a regular basis, such as every Monday or every two weeks.

To add a calendar event:

1. Open the calendar to which you want to add an event.
2. Do one of the following:
   - Click the **Add Event** icon corresponding to the date on which you want to add the event.
   - From the **Add** menu, select **Event**.

**Note:** If your administrator created a custom event, it appears in the **Add** menu.

3. In the **Title** field, enter a name for the event.
4. If the event is to occur on a regular basis, select the **Repeat** frequency and number of occurrences.
5. Enter any optional information. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

6. Click **Apply**.

   The event is added to the calendar.
7. You can click the event name to open it.

To change the event's permissions, see Access permissions.

# Viewing and changing calendar event properties

You can view and change the properties of a calendar event such as the title or time. If the event is recurring, the change is made to each event in the series. To change the properties, you must be the logged-in owner of the event or a logged-in user with Writer permission to the event.

To view and change a calendar event's properties:

1. Navigate to and open the calendar that contains the event you want to view and change.
2. Click the title of the event.
3. On the View Properties page, click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.
5. Click **Apply**.

## Viewing the change history

**Only for DocuShare CPX**

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. You can view the changes to any object to which you have Reader permission.

To view the change history:

1. Locate the calendar event whose change history you want to view.
2. Click the event's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

# Changing the location of a calendar event

You can move an event to another calendar or have it appear in several calenders. To move an event, you must be logged in and have Writer permission to both the event and the new calendar.

Although an event can appear in several calendars, there is only one copy of it, which saves space on your DocuShare site.

To change the location of a calendar event:

1. Navigate to and open the calendar that contains the event you want to move.
2. Click the title of the event.

   The View Properties page appears.
3. Click the **Locations** link.

   The Locations page appears, showing the event's current location(s).
4. In the **Sort By** field, select **Title** to display the possible locations in alphabetical order or select **Handle** to display the possible locations in numerical order.
5. Do one of the following:
   - To find specific calendars, enter any part of a calendar title in the **Search** field. Click the **Go** button.
   - To display all calendars, click **Show All**.
   - To display your favorite calendars, click **Show Favorites**.
6. In the **Possible Locations** field, select the calendar(s) in which you want the event to appear and click the **Add** button. To select multiple calendars, use the CTRL key (Windows) or the Command key (Macintosh).
7. In the **Selected Locations** field, select any calendars in which you do not want the event to appear and click the **Remove** button. To select multiple calendars, use the CTRL key (Windows) or the Command key (Macintosh).

**Note:** Make sure at least one calendar appears in the **Selected Locations** field. Otherwise, the event will become orphaned, which means it will not appear in any calendar.

8. Click **Update Locations**.

# Deleting a calendar event

You can delete a calendar event if you are the logged-in owner of the event or a logged-in user with Manager permission to it. However, if the event is one of a recurring series, you need only Writer permission to the event to delete it.

To delete a calendar event:

1. Navigate to and open the calendar that contains the event you want to delete.
2. Click the title of the event.

   The View Properties page appears.
3. Click the event's **Delete** icon.
4. On the Confirm Delete page, do one of the following:
   - If the event is a single occurrence, click the **Delete** button.
   - If the event occurs more than once, click the **Delete All Events in This Series** button to delete all occurrences of the event from the calendar; click the **Delete Just This Event** button to delete the event from the date you selected.

# 7

# DocuShare workspaces


- About workspaces . . . . . 7–2
- Adding a workspace . . . . . 7–3
- Controlling access to the workspace . . . . . 7–4
- Adding content to the workspace . . . . . 7–7
- Managing shortcuts . . . . . 7–8
- Using calendars . . . . . 7–9
- Changing portlet properties . . . . . 7–10
- Viewing and changing workspace properties . . . . . 7–11
- Changing the location of a workspace . . . . . 7–12
- Deleting a workspace . . . . . 7–13

# About workspaces

**Only for DocuShare CPX**

A workspace provides a shared area for project and team collaboration. From a single page within DocuShare you and other workspace members can gather and manage shared content, access collaboration tools to facilitate your work, and communicate with each other.

A workspace consists of four distinct areas called portlets; each portlet has a different use.

- **Content portlet**—The area in which you add and manage shared content.
- **Shortcuts portlet**—Displays frequently used objects.
- **Calendars portlet**—Shows a combination of the calendars in the content portlet.
- **Membership portlet**—Lists the users who are members of the workspace membership group.

You can close a portlet and reopen it by clicking the small triangle next to the portlet title.

# Adding a workspace

You can add a workspace to another workspace to which you have Writer permission, or you add a workspace to My DocuShare. To guide you in creating a workspace, DocuShare provides templates and a wizard.

When adding a workspace, a **membership group** is created automatically and initially includes you as its member. You can add members to the group after the workspace is added. The members are listed in the membership portlet on the workspace home page.

**Note:** If you are a Site Administrator or a Content Administrator, an **[add]** link appears on the home page. This allows you to add a workspace to your site home page.

To add a workspace:

1. To add a workspace to another workspace, do one of the following and then go to step 3:
   - On the DocuShare home page, click **more** under Workspaces. Search for the workspace to which you want to add a workspace. Open the workspace and select **Workspace** from the **Add** menu.
   - Go to My DocuShare. In the workspaces portlet, search for the workspace to which you want to add a workspace. Open the workspace and select **Workspace** from the **Add** menu.
   - Navigate to and open the workspace to which you want to add a workspace. In the content portlet, select **Workspace** from the **Add** menu.
2. To add a workspace to My DocuShare, do one of the following:
   - On the DocuShare home page, click **more** under Workspaces. Then click **Add a Workspace**.
   - Go to My DocuShare. In the workspaces portlet, click **Add a Workspace**.
3. On the Add a New Workspace page, select one of the following templates:
   - **Document Storage**—includes four workspace collections in the content portlet.
   - **Team Project**—includes one workspace collection, a calendar, and a collection for online meeting URLs in the content portlet.
4. Click **Next**.
5. In the **Title** field, enter a name for the workspace.
6. Enter any optional information. Click a field name for a description of each property.
7. Click **Done**.

   The workspace home page appears.

# Controlling access to the workspace

To change the users and groups that have access to the workspace, you simply change the members of the workspace membership group. Any user or group that you add to the group is assigned Reader and Writer permissions to the workspace. You can choose to give the group Manager permission to the workspace.

In addition to listing the group members, the membership portlet enables you to see which users are logged into DocuShare. The user icon next to the user's name in the portlet indicates whether or not the user is logged in; the icon is grayed when the user is not logged in.

Like other DocuShare objects, a workspace has an access list, which you can use to give users and groups access to the workspace. However, any users and groups that you add to the access list are not listed in the membership portlet.

## Changing the users and groups in the membership group

If you are the workspace owner or a member of the membership group (and the group is assigned Manager permission to the workspace), you change the users and groups in the group.

**Note:** The membership portlet lists users only. Therefore, individual group members are listed and not the group titles.

To change the members of the membership group:

1. On the workspace home page, do one of the following:
   - Click the **Membership** heading.
   - Click the **Properties** icon. On the Properties page, click the **Membership** link.

   The Membership page appears showing the current members.
2. Click the **Change Membership** link.
3. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
4. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
5. In the **Possible Users/Groups** field, select the accounts to add to the group and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Users/Groups** field, select any accounts that you want to remove from the group and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
7. Click **Update**.

The Members page appears.

8. To give one or more members Manager permission to the group, click the checkbox next to each member's name and then click **Apply**. Manager permission allows the member to change the group's properties and membership.
9. To assign Manager permission to the membership group, display the Permissions page for the workspace. Click the Manager box for the group and click **Apply**.

## Re-assigning the membership group

As needed, you can change the membership group that is associated with the workspace by assigning a different group to the workspace. You can re-assign the membership group if you are the workspace owner or a user with Manager permission to it.

To re-assign the membership group:

1. On the workspace home page, click the **Properties** icon.
2. On the Properties page, click the **Permissions** link.
3. Click the **Re-assign Membership Group** button.

   The Re-assign Membership Group page appears.
4. Do one of the following:
   - To find a specific group, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all groups, click **Show All**.
   - To display your favorite groups, click **Show Favorites**.
5. In the **New Membership Group** field, select the group you want to associate with the workspace.
6. Click **Save**.

   The previous membership group remains in the workspace's access list.

## Changing the workspace's permissions

Using the Permissions page you can change the users and groups in the workspace's access list and assign permissions. Users and groups in the access list do not appear in the membership portlet on the workspace home page; the members of the membership group are listed in the portlet. You can change the workspace's permissions if you are the workspace owner or a user with Manager permission to it.

To change the workspace's permissions:

1. On the workspace home page, select **Permissions** from the **More Actions** menu.

   The Permissions page displays the workspace's access list.
2. Click the **Change Access List** button.

   The Change Access List page appears.
3. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.

4. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
5. In the **Possible Users/Groups** field, select the accounts to add to the access list and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Users/Groups** field, select any accounts that you want to remove from the access list and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
7. Click **Update Access List**.

   The Permissions page appears.
8. For **Search Available To**, do one of the following:
   - Click **Anyone** to allow guests and users to view the workspace in a search results list.
   - Click **Access List Only** to allow only those accounts in the workspace's access list that have at least Reader permission to see the object in a search results list.
9. For **Options**, select one of the following:
   - **Apply all permissions to**—Assigns all of the permissions.
   - **Apply only changes to**—Assigns only the changed permissions.
10. Select one of the following:
    - **This container only**—Applies the permissions to the container only. The permissions of the container's objects are not changed.
    - **This container and its objects, including objects that appear in multiple locations**—Applies the permissions to the container and the objects in it. The permissions of the same objects that appear in other containers also are changed.
    - **This container and its objects, excluding objects that appear in multiple locations**—Applies the permissions to the container and the objects in it. The permissions of the same objects that appear in other containers are **not** changed.
11. Click **Apply**.

# Adding content to the workspace

You can add any type of object, including another workspace, to a workspace. To add content, you must be logged in and have Writer permission to the workspace.

To add content to the workspace:

1. In the content portlet, select the type of object that you want to add from the **Add** menu.
2. On the Add page, enter the required information and click **Apply**.

   The object appears in the content portlet.

To use workspace view features:

1. From the **Show** menu, select the type of object you want to display.
2. Click a **View** icon to switch between the icon and list views.

# Managing shortcuts

To conveniently access frequently used objects from a workspace, you can add shortcuts to them. Any object you add as a shortcut is a link to the original object, not a copy. If the original object is deleted, it will no longer appear as a shortcut.

To add a shortcut to a workspace:

1. Locate the object that you want to add as a shortcut.
2. Click the checkbox that appears next to the object's title.
3. From the **Edit Selected** menu, select **Copy Shortcuts**.
4. On the Confirm Copy Shortcuts page, click **Confirm**.
5. Navigate to and open the workspace to which you want to add the shortcut.
6. In the shortcuts portlet, click the **Paste Shortcuts** icon.
7. On the Confirm Paste Shortcut page, click **Confirm**.

   The object you added appears in the shortcuts portlets. You can use the **Show** menu to display one type of object, such as documents. The **View** icons let you switch between the icon and list views.

To remove a shortcut from a workspace:

1. Navigate to and open the workspace that contains the shortcut that you want to remove.
2. In the shortcuts portlet, click the **List View** icon to display the shortcuts in a list.
3. Click the **Remove Shortcut** icon that appears next to the object you want to remove.
4. On the Confirm Remove Shortcut page, click **Confirm**.

   The object no longer appears in shortcuts. However, the object still appears in its original location(s).

# Using calendars

The calendars portlet shows all of the calendars from the content portlet. This allows you and other workspace members to quickly access individual calendars as well as to view the events from all calendars.

To use the calendars portlet:

1. From the **Show** menu, select the calendar that you want to view or select **All Calendars** to view all calendars.
2. Using the **View** icons, you can switch between daily and weekly calendar views.

# Changing portlet properties

Each portlet has default display properties that you can change. For example, you can set the default view to list view to display objects in a collection-style listing.

To change the properties of a portlet:

1. Click the portlet's **Edit** button.
2. Depending on which portlet properties you are changing, do one or all of the following:
   a. In the **Page Size** field, enter the number of objects to show on each page.
   b. In the **Sort Order** field, enter the order in which to display objects.
   c. In the **View Type** field, enter the type of view used to display objects.

   Click a field name for a description of each property.
3. Click **Apply**.

# Viewing and changing workspace properties

You can change a workspace's properties if you are the logged-in owner of the workspace or a logged-in user with Writer permission to it.

To view and change a workspace's properties:

1. Locate the workspace whose properties you want to view and change.
2. Click the workspace's **Properties** icon.
3. On the View Properties page, click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

## Viewing the change history

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. You can view the changes to any object to which you have Reader permission.

To view the change history:

1. Locate the workspace whose change history you want to view.
2. Click the workspace's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

# Changing the location of a workspace

You can move a workspace to another workspace or have it appear in several workspaces on your site. Although a workspace can appear in several workspaces, there is only one copy of it, which saves space on your DocuShare site.

To change a workspace's location, you must be logged in and have Writer permission to both the current and new workspace.

**Note:** You can also use the **Copy**, **Cut**, and **Paste** commands from the **Edit Selected** menu to change the location of a workspace.

To change a workspace's location:

1. Locate the workspace whose location you want to change.
2. Do one of the following:
   - In the content portlet, click the **Properties** icon that appears next to the workspace's title. On the Properties page, click the **Locations** link.
   - Click the **Content** heading. Click the checkbox that appears next to the workspace's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.

   The Locations page appears.
3. Click the **Add Locations** button.
4. In the **Sort By** field, select **Title** to display the possible locations in alphabetical order or select **Handle** to display the possible locations in numerical order.
5. Do one of the following:
   - To find specific workspaces, enter any part of a workspace title in the **Search** field. Click the **Go** button.
   - To display all workspaces, click **Show All**.
   - To display your favorite workspaces, click **Show Favorites**.
6. In the **Possible Locations** field, select the workspace(s) in which you want the workspace to appear and click the **Add** button. To select multiple workspaces, use the CTRL key (Windows) or the Command key (Macintosh).
7. In the **Selected Locations** field, select any workspaces in which you do not want the workspace to appear and click the **Remove** button. To select multiple workspaces, use the CTRL key (Windows) or the Command key (Macintosh).

**Note:** Make sure at least one workspace appears in the **Selected Locations** field. Otherwise, the workspace will become orphaned, which means it will not appear in any workspace.

8. Click **Update Locations**.

   The Properties page for the workspace appears displaying the workspace title(s) in which the workspace now appears.

# Deleting a workspace

You can delete a workspace if you are the logged-in owner of the workspace or have Manager permission to it. When you delete a workspace, you can choose to delete the workspace only or the workspace and its contents. To delete the workspace and its contents, you must be the owner of the objects in the workspace or have Manager permission to them.

After deleting a workspace, it goes to your personal trashcan on My DocuShare. You can restore an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See My DocuShare for more information.

To delete a workspace:

1. Do one of the following:
   - Search for the workspace that you want to delete. On the Search Results page, click **Delete** from the workspace's **More Actions** menu.
   - Go to My DocuShare. In the workspaces portlet, open the workspace that you want to delete. Click the **Properties** icon and then click **Delete**.

   The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the workspace, then you do not have Manager permission to the object and cannot delete it.

2. From the **For workspaces, delete** menu, do one of the following:
   - Select **Workspace and Contents** to delete the workspace and all of the objects in it.
   - Select **Workspace Only** to delete the workspace, but not its contents.
3. In the **Membership group** field, choose whether or not to delete the workspace membership group.
4. Click **Delete** to remove the workspace from your site.

# 8

# DocuShare wikis


- About wikis . . . . . 8–2
- Adding a wiki . . . . . 8–3
- Adding content to a wiki . . . . . 8–4
- Renaming wiki pages . . . . . 8–6
- Printing wiki pages . . . . . 8–7
- Viewing and changing wiki properties . . . . . 8–8
- Changing the location of a wiki . . . . . 8–9
- Deleting a wiki . . . . . 8–10

# About wikis

A wiki allows you and other users to quickly and easily publish content on the web. Using a web browser and either the built-in WYSIWYG (What You See Is What You Get) editor or simple wiki syntax, you can add and link web pages and edit content instantly. Wikis are well-suited for any type of project that requires collaborative writing.

# Adding a wiki

To get started, you first add a wiki to a collection or workspace (*DocuShare CPX only*) and then add content to it. You can add a wiki if you are logged in and have Writer permission to the container.

To add a wiki:

1. Navigate to and open the container to which you want to add a wiki.
2. From the **Add** menu, select **Wiki**.

   The Add Wiki page appears.
3. In the **Title** field, enter a name for the wiki. The name can contain spaces and punctuation marks.
4. Enter any optional information. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

   The wiki is added to the container.

To change the wiki's permissions, see Access permissions.

# Adding content to a wiki

You add content to the wiki by editing the wiki home page, creating and linking additional wiki pages, inserting images, and attaching documents. You can add content to the wiki if you are logged in and have Writer permission to it.

Each wiki page includes a WYSIWYG editor for easy formatting of content. Alternatively, you can use the wiki syntax provided in a sidebar on a wiki page. However, when editing a wiki page, you should use the same method you used to create the page.

## Adding content to the wiki home page

After adding the wiki, your first step is to add content to the home page.

To add content to the home page:

1. Locate and open the wiki to which you want to add content.

   The Add WikiPage appears and the page is titled HomePage.
2. In the **Description** field, enter the page content using one of the following methods:
   - Use the WYSIWYG editor. The editor appears when the **wysiwyg** checkbox is selected.
   - Deselect the **wysiwyg** checkbox. Use the wiki syntax displayed in the sidebar.
3. Click **Apply**.

   The wiki home page appears with your content.

## Linking pages to a wiki

You can add any number of web pages to the wiki. You first add the link to the page and then enter content on the page.

To link a page to the wiki:

1. Open a wiki page and click **Edit This Page**.
2. On the Edit Wiki page, enter the new page name between double square brackets.

   **Example**: [[New Wiki Page]]
3. Click **Apply**.

   The page appears showing the page name you entered followed by a question mark.
4. Click the page name.

   The Add WikiPage appears.
5. In the **Description** field, enter the page content using either the WYSIWYG editor or wiki syntax.
6. Click **Apply**.

   The pages are linked.

**Note:** To list the pages linked to a wiki page, view the wiki page and click **Backlinks**. The linked pages are listed on the Search Results page.

## Inserting images

On a wiki page you can insert an image that is located on an external URL or on the same DocuShare server.

To insert an image on a wiki page using the WYSIWYG editor:

1. Do one of the following:
   - To insert an image located on an external URL, select the text to link to the image and click the **Insert/Edit Link** button on the WYSIWYG bar. Enter the complete URL to the image and click **Insert**.
   - To insert an image located on the same DocuShare server, enter {image:Document-#}.
2. Click **Apply**.

To insert an image on a wiki page using wiki syntax:

1. Do one of the following:
   - To insert an image located on an external URL, enter {image:url}.
   - To insert an image located on the same DocuShare server, enter {image:Document-#}.
2. Click **Apply**.

## Attaching documents

On a wiki page you can add a link to a document that you upload to DocuShare.

To attach a document to a wiki page:

1. Open a wiki page and click **Attach**.

   The Add Document page appears.
2. Enter the complete path and filename of the document in the **Filename** field or click the **Browse** button to navigate to and select the document.
3. In the **Title** field, enter a document name.
4. Click **Apply**.
5. On the wiki page, click **Edit This Page**.
6. On the Edit Wiki page, enter the document name that you used in step 3 between double square brackets.

   **Example**: For more information, see our [[brochure]].
7. Click **Apply**.

# Renaming wiki pages

If you are a logged-in user with Writer permission to the wiki can change the name of a wiki page.

To rename a wiki page:

1. Locate and open the wiki page that you want to rename.
2. Click **Rename This Page**.
3. In the **Title** field, enter a new name; then click **Rename**.
4. On the confirmation page, click **OK**.

**Note:** You cannot rename the wiki home page.

# Printing wiki pages

You can print some or all of your wiki pages to review the content on the pages or to have a printed copy of the wiki.

To print wiki pages:

1. Locate and open the homepage of the wiki that you want to print.
2. Click **Printable View**.

   The view shows the top two levels of the wiki, with the homepage as the top level, or level one.
3. To view other wiki pages, do any of the following:
   - To remove one level of pages from the view, click **Subtract One Level**.
   - To add one level of pages to the view, click **Add One Level**.
   - To display all levels of pages, click **Show All Levels**. When viewing all levels, you can click **Show Two Levels** to view the top two levels of the wiki.
4. Use the **Print** command from the **File** menu to print the wiki view.

# Viewing and changing wiki properties

If you are logged in and have Reader permission to a wiki, you can view its properties.You can change a wiki's properties if you are the logged-in owner of the object or a logged-in user with Writer permission to it.

To view and change a wiki's properties:

1. Locate the wiki whose properties you want to view and change.
2. Click the wiki's **Properties** icon.
3. On the View Properties page, click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

## Viewing the change history

**Only for DocuShare CPX**

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. You can view the changes to any object to which you have Reader permission.

To view the change history:

1. Locate the wiki whose change history you want to view.
2. Click the wiki's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

# Changing the location of a wiki

You can move a wiki to another container or have the wiki appear in several containers on your site. Although a wiki can appear in several containers, there is only one copy of it, which saves space on your DocuShare site.

To change a wiki's location, you must be logged in and have Writer permission to both the wiki and the new location.

To change a wiki's location:

1. Locate the wiki that you want to move.
2. Do one of the following:
   - Click the checkbox that appears next to the wiki's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the wiki's **Properties** icon. On the Properties page for the wiki, click the **Locations** tab.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible containers in alphabetical order or select **Handle** to display the possible containers in numerical order.
4. Do one of the following:
   - To find specific containers, enter any part of a container title in the **Search** field and click **Go**.
   - To display all containers, click **Show All**.
   - To display your favorite containers, click **Show Favorites**.
5. In the **Possible Locations** field, select the container(s) in which you want the object to appear and click the **Add** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any containers in which you do not want the object to appear and click the **Remove** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).

**Note:** Make sure at least one container appears in the **Selected Locations** field. Otherwise, the object will become orphaned, which means it will not appear in any container.

7. Click **Update Locations**.

   The Locations page appears displaying the container title(s) in which the object now appears.

# Deleting a wiki

You can delete a wiki, which deletes all of its pages, or delete an individual wiki page if you are the logged-in owner of the wiki or have Manager permission to it.

After deleting a wiki, it goes to your personal trashcan on My DocuShare. You can restore an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See My DocuShare for more information.

To delete a wiki or a wiki page:

1. Locate the wiki or the wiki page that you want to delete.
2. From the **More** menu. select **Delete**.

   The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the wiki or wiki page, then you do not have Manager permission to the object and cannot delete it.

3. Click **Delete** to remove the wiki or wiki page from your site.

# 9

# DocuShare weblogs


- About weblogs . . . . . 9–2
- Adding a weblog. . . . . 9–3
- Posting weblog entries . . . . . 9–4
- Adding comments to entries. . . . . 9–6
- Viewing and changing weblog properties. . . . . 9–7
- Changing the location of a weblog . . . . . 9–8
- Deleting a weblog. . . . . 9–9

# About weblogs

A weblog is a simple web site on which you post entries about a specific topic on a regular basis. Entries are displayed in reverse chronological order and include the name of the user who posted the entry.

When adding a weblog, you can choose to have it moderated. A moderated weblog requires a user with Manager permission to the weblog to approve its entries before they are posted for all users to read.

# Adding a weblog

You can add a weblog to a collection or workspace (*DocuShare CPX only*) if you are logged in and have Writer permission to the container. By default, when you add a weblog, you are the only user with Writer permission to the object (**Initial Permissions** is set to **Same as container except write restricted to owner**). If you want other users and groups to add entries to the weblog, either change the **Initial Permissions** setting when adding the object or change the object's permissions after adding it.

To add a weblog:

1. Navigate to and open the container to which you want to add a weblog.
2. From the **Add** menu, select **Weblog**.

   The Add Weblog page appears.
3. In the **Title** field, enter a name for the weblog. The name should be short, but descriptive, and can contain spaces and punctuation marks.
4. Change any of the default property values and enter any optional information. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

   The weblog is added to the container.

To change the weblog's permissions, see Access permissions.

# Posting weblog entries

To add content to a weblog, you post entries to it. By default, entries appear in chronological order, with the most recent entries displayed first. If you are logged in and have Writer permission to a weblog, you can post entries to it.

To post an entry:

1. Locate and open the weblog to which you want to post an entry.
2. Click the **Add Entry** link.

   The Add Weblog Entry page appears.
3. In the **Title** field, enter a name for the entry. The name should be short, but descriptive, and can contain spaces and punctuation marks.
4. In the **Description** field, enter the body of the entry.
5. Enter any optional information. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

6. Click **Apply**.

   The entry appears in the weblog and includes the date the entry was posted and your username. If the weblog is moderated, **Approval Pending** precedes your username. Users cannot read the entry until a user with Manager permission to the weblog approves it.

## Editing weblog entries

If you are logged in and have Writer permission to a weblog, you can edit the entries in it.

To edit an entry:

1. Locate and open the weblog that contains the entry you want to edit.
2. Click the **Edit** icon next to the entry.
3. Make the changes you want.
4. Click **Apply**.

## Deleting weblog entries

You can delete a weblog entry if you are the logged-in owner of the object or a logged-in user with Manager permission to it.

To delete a weblog entry:

1. Locate and open the weblog that contains the entry you want to delete.
2. Click the weblog entry title.
3. From the weblog entry's **More actions** menu, select **Delete**.

   The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the weblog entry, then you do not have Manager permission to the object and cannot delete it.

4. Click **Delete** to remove the object from your site.

## Approving entries

If you are a user with Manager permission to a weblog that is moderated, you must approve an entry before it is posted for all users to read.

To approve an entry:

1. Do one of the following:
   - Locate and open the weblog that contains the entry you need to approve. Click the checkmark next to the entry.
   - On the navigation bar, click **My Tasks**. From the **Show** menu, select **Tasks Assigned to Me**. Click the weblog entry title.
   - On the navigation bar, click **My DocuShare**. The tasks assigned to you display under **Tasks**. Click the weblog entry title.

   A For Your Approval window appears.
2. Click the title of the entry to review the text.
3. Click the **Approved** button.

# Adding comments to entries

If you are logged in and have Reader permission to a weblog, you can add a comment to a weblog entry.

To add a comment:

1. Locate and open the weblog entry to which you want to add a comment.
2. Click the **Add a Comment** link.
3. In the **Title** field, enter a comment title.
4. In the **Description** field, enter the comment text.
5. Click **Apply**.

## Viewing comments

If you are logged in and have Reader permission to a weblog, you can view the comments on entries.

To view comments:

1. Locate and open the weblog.

   The weblog entries display. A **Comments** link appears for an entry that includes comments.
2. Click a **Comments** link.

   The comments display in reverse chronological order and include the name of the user who posted the comment.

## Deleting comments

If you are the user who added the comment or the user who added the entry, you can delete the comment.

To delete a comment:

1. Locate and open the weblog entry that includes the comment you want to delete.
2. Click the comment title.
3. From the **More Actions menu**, select **Delete**.

   The Confirm Delete page appears.
4. Click **Delete** to remove the object from your site.

   If you do not want to delete the object, click **Cancel**.

# Viewing and changing weblog properties

If you are logged in and have Reader permission to a weblog, you can view its properties. You can change a weblog's properties if you are the logged-in owner of the object or a logged-in user with Writer permission to it.

To view and change a weblog's properties:

1. Locate the weblog whose properties you want to view and change.
2. Click the weblog's **Properties** icon.
3. On the View Properties page, click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.
5. Click **Apply**.

## Viewing the change history

**Only for DocuShare CPX**

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. You can view the changes to any object to which you have Reader permission.

To view the change history:

1. Locate the weblog whose change history you want to view.
2. Click the weblog's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

# Changing the location of a weblog

You can move a weblog to another container or have the weblog appear in several containers on your site. Although a weblog can appear in several containers, there is only one copy of it, which saves space on your DocuShare site.

To change a weblog's location, you must be logged in and have Writer permission to both the weblog and the new container.

To change a weblog's location:

1. Locate the weblog that you want to move.
2. Do one of the following:
   - Click the checkbox that appears next to the weblog's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the weblog's **Properties** icon. On the View Properties page, click the **Locations** tab.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible containers in alphabetical order or select **Handle** to display the possible containers in numerical order.
4. Do one of the following:
   - To find specific containers, enter any part of a container title in the **Search** field and click **Go**.
   - To display all containers, click **Show All**.
   - To display your favorite containers, click **Show Favorites**.
5. In the **Possible Locations** field, select the container(s) in which you want the object to appear and click the **Add** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any containers in which you do not want the object to appear and click the **Remove** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).

**Note:** Make sure at least one container appears in the **Selected Locations** field. Otherwise, the object will become orphaned, which means it will not appear in any container.

7. Click **Update Locations**.

   The Locations page appears displaying the container title(s) in which the object now appears.

# Deleting a weblog

You can delete a weblog, which deletes all of its entries, or delete an individual entry if you are the logged-in owner of the weblog or a logged-in user with Manager permission to it.

After deleting a weblog, it goes to your personal trashcan on My DocuShare. You can restore an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See My DocuShare for more information.

To delete a weblog or an entry:

1. Locate the weblog or entry that you want to delete.
2. From the **More** menu. select **Delete**.

   The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the weblog or entry, then you do not have Manager permission to the object and cannot delete it.

3. Click **Delete** to remove the weblog or entry from your site.

# 10

# DocuShare discussions


- About discussions . . . . . 10–2
- Adding a discussion . . . . . 10–3
- Viewing and changing discussion properties . . . . . 10–4
- Changing the location of a discussion . . . . . 10–5
- Deleting a discussion . . . . . 10–6
- Adding a topic to a discussion . . . . . 10–7
- Viewing and changing the properties of a topic or reply . . . . . 10–8
- Changing the location of a topic . . . . . 10–9
- Deleting a topic or reply . . . . . 10–10
- Viewing and deleting expired topics . . . . . 10–11

# About discussions

To facilitate an online exchange of ideas, DocuShare supports threaded discussions. You can add a container, called a discussion, in which users add topics for other users to read and reply to. As users reply to a topic, their responses are sequentially linked, or threaded, to the original topic. Users can read or reply to any of the topics or replies in a thread.

# Adding a discussion

You can add a discussion to a collection or workspace (*DocuShare CPX only*) if you are logged in and have Writer permission to the container.

To add a discussion:

1. Navigate to and open the container to which you want to add a discussion.
2. From the **Add** menu, select **Discussion**.

   The Add Discussion page appears.
3. In the **Title** field, enter a name for the discussion. The name should be short, but descriptive, and can contain spaces and punctuation marks.
4. In the **Topics Expire In** field, select the length of time to retain topics and their message threads in the discussion after they are added.

   When a topic becomes older than the duration you select, it no longer appears in the discussion. You can view and delete expired topics on the discussion's View Expired page.
5. Enter any optional information. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

6. Click **Apply**.

   The discussion is added to the container.

To change the discussion's permissions, see Access permissions.

# Viewing and changing discussion properties

If you are logged in and have Reader permission to a discussion, you can view its properties. You can change a discussion's properties if you are the logged-in owner of the discussion or a logged-in user with Writer permission to it.

To view and change a discussion's properties:

1. Locate the discussion whose properties you want to view and change.
2. Click the discussion's **Properties** icon.
3. On the View Properties page, click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

## Viewing the change history

**Only for DocuShare CPX**

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. You can view the changes to any object to which you have Reader permission.

To view the change history:

1. Locate the discussion whose change history you want to view.
2. Click the discussion's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

# Changing the location of a discussion

You can move a discussion to another container or have the discussion appear in several containers on your site. Although a discussion can appear in several containers, there is only one copy of it, which saves space on your DocuShare site.

To change a discussion's location, you must be logged in and have Writer permission to both the discussion and the new container.

**Note:** You can also use the **Copy**, **Cut**, and **Paste** commands from the **Edit Selected** menu to change the location of a discussion. See Editing multiple objects in a collection on page 3–7.

To change a discussion's location:

1. Locate the discussion whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the discussion's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the discussion's title. Click the **Locations** link.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible containers in alphabetical order or select **Handle** to display the possible containers in numerical order.
4. Do one of the following:
   - To find specific containers, enter any part of a container title in the **Search** field. Click the **Go** button.
   - To display all containers, click **Show All**.
   - To display your favorite containers, click **Show Favorites**.
5. In the **Possible Locations** field, select the container(s) in which you want the discussion to appear and click the **Add** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any containers in which you do not want the discussion to appear and click the **Remove** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).

**Note:** Make sure at least one container appears in the **Selected Locations** field. Otherwise, the discussion will become orphaned, which means it will not appear in any container.

7. Click **Update Locations**.

# Deleting a discussion

You can delete a discussion on your DocuShare site if you are the logged-in owner of the discussion or have Manager permission to it. When you delete a discussion, all of its current and expired topics are also deleted.

After deleting a discussion, it goes to your personal trashcan on My DocuShare. You can restore an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See My DocuShare for more information.

To delete a discussion:

1. Locate the discussion that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the discussion's title. From the **Edit Selected** menu, select **Delete**.
   - From the discussion's **More Actions** menu, select **Delete**.

   The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the discussion, then you do not have Manager permission to the object and cannot delete it.

3. Click **Delete** to remove the discussion from your site.

# Adding a topic to a discussion

A topic is the first message added to a discussion and initiates the online conversation. Users can reply to the topic as well as to individual replies. By default, replies are indented, which provides a hierarchical display of the discussion.

You can add a topic to a discussion if you are logged in and have Writer permission to the discussion.

To add a topic:

1. Open the discussion to which you want to add a topic.
2. Click the **Add Topic** button.

**Note:** If your administrator created a custom topic, it appears in the **Add** menu.

3. In the **Title** field, enter a name for the topic.
4. In the **Description** field, enter the body of the topic.
5. Click **Submit**.

   The topic is added to the discussion.

To change the topic's permissions, see Access permissions.

## Adding replies

If you are logged in and have Writer permission to the topic or reply, you can add a reply.

To add a reply:

1. Navigate to and open the discussion.
2. Locate the topic or reply to which you want to reply.
3. Click the **Reply** button.
4. Enter a title and description.
5. If you want to include the previous message and the name of the user who added it, click **Quote Post**.
6. Click **Submit**.

# Viewing and changing the properties of a topic or reply

If you are logged in and have Reader permission to a topic or reply, you can view its properties. You can change the properties of a topic or reply if you are logged into DocuShare and have Writer permission to the object.

To view and change the properties of a topic or reply:

1. Navigate to and open the discussion that contains the topic or reply you want to change.
2. Click the **Properties** icon that appears to the right of the object.
3. On the View Properties page, click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.
5. Click **Apply**.

## Viewing the change history

**Only for DocuShare CPX**

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. You can view the changes to any object to which you have Reader permission.

To view the change history:

1. Locate the topic or reply whose change history you want to view.
2. Click the object's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

# Changing the location of a topic

You can move a topic and its message thread to another discussion or have it appear in several discussions. To move a topic, you must be logged in and have Writer permission to both the topic and the new discussion.

Although a topic can appear in several discussions, there is only one copy of it, which saves space on your DocuShare site.

To change the location of a topic:

1. Navigate to and open the discussion that contains the topic you want to move.
2. Click the **Properties** icon that appears to the right of the topic's title.

   The View Properties page appears.
3. Click the **Locations** link.

   The Locations page appears, showing the topic's current location(s).
4. In the **Sort By** field, select **Title** to display the possible locations in alphabetical order or select **Handle** to display the possible locations in numerical order.
5. Do one of the following:
   - To find specific discussions, enter any part of a discussion title in the **Search** field. Click the **Go** button.
   - To display all discussions, click **Show All**.
   - To display your favorite discussions, click **Show Favorites**.
6. In the **Possible Locations** field, select the discussion(s) in which you want the topic to appear and click the **Add** button. To select multiple discussions, use the CTRL key (Windows) or the Command key (Macintosh).
7. In the **Selected Locations** field, select any discussions in which you do not want the topic to appear and click the **Remove** button. To select multiple discussions, use the CTRL key (Windows) or the Command key (Macintosh).

**Note:** Make sure at least one discussion appears in the **Selected Locations** field. Otherwise, the topic will become orphaned, which means it will not appear in any discussion.

8. Click **Update Locations**.

# Deleting a topic or reply

You can delete a topic or reply if you are the logged-in owner of the object or have Manager permission to it. When you delete a topic or reply, any message threads also are deleted.

To delete a topic or reply:

1. Navigate to and open the discussion that contains the topic or reply that you want to delete.
2. Do one of the following:
   - From the object's **More Actions** menu, select **Delete**.
   - Select the checkbox that appears next to the object's title. From the **Edit Selected** menu, select **Delete**.

   The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the topic or reply, then you do not have Manager permission to the object and cannot delete it.

3. On the Confirm Delete page, click the **Delete** button.

# Viewing and deleting expired topics

If you set an expiration for the topics added to a discussion, you can view and delete the expired topics. To delete expired topics, you must be logged in and have Manager permission to the topics.

To view and delete expired topics:

1. Locate the discussion whose expired topics you want to view.
2. Click the **Properties** icon that appears to the right of the discussion's title.

   The View Properties page appears.
3. Click the **View Expired** link.

   The page displays all of the expired topics that no longer appear on the discussion.
4. Do one of the following:
   - Select the individual topics that you want to delete.
   - Click **Select All** to select all of the topics.
5. Click **Delete Selected**.

# 11

# DocuShare URLs


- About URLs . . . . . 11–2
- Adding a URL . . . . . 11–3
- Viewing and changing URL properties . . . . . 11–4
- Changing the location of a URL . . . . . 11–5
- Deleting a URL . . . . . 11–6

# About URLs

A DocuShare URL is a link to a web page. Adding a URL to your site enables you to easily share useful and interesting web pages with other DocuShare users and guests.

# Adding a URL

You can add a URL to a collection or workspace (*DocuShare CPX only*) if you are logged in and have Writer permission to the container.

To add a URL:

1. Navigate to and open the container to which you want to add a URL.
2. From the **Add** menu, select **URL**.

   The Add URL page appears.
3. In the **URL** field, enter the Internet address of the web page (for example, http://docushare.xerox.com).

   While viewing the web page in a browser, you can copy the URL from the **Address** or **Location** field and paste it into the **URL** field.
4. In the **Title** field, enter a name for the URL. The name should be short, but descriptive, and can contain spaces and punctuation marks.
5. Enter any optional information. Click a field name for a description of each property.
6. Click **Apply**.

   The URL is added to the container.

To change the URL's permissions, see Access permissions.

# Viewing and changing URL properties

If you are logged in and have Reader permission to a URL, you can view its properties. You can change a URL's properties if you are the logged-in owner of the URL or a logged-in user with Writer permission to it.

To view and change a URL's properties:

1. Locate the URL whose properties you want to view and change.
2. Click the URL's **Properties** icon.
3. On the View Properties page, click the **Edit** link.
4. Change the properties you want. Click a field name for a description of each property.

**Note:** If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply**.

## Viewing the change history

**Only for DocuShare CPX**

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. You can view the changes to any object to which you have Reader permission.

To view the change history:

1. Locate the URL whose change history you want to view.
2. Click the URL's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

# Changing the location of a URL

You can move a URL to another container or have the URL appear in several containers on your site. Although a URL can appear in several containers, there is only one copy of it, which saves space on your DocuShare site.

To change a URL's location, you must be logged in and have Writer permission to both the URL and the new container.

**Note:** You can also use the **Copy**, **Cut**, and **Paste** commands from the **Edit Selected** menu to change the location of a URL. See Editing multiple objects in a collection on page 3–7.

To change a URL's location:

1. Locate the URL whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the URL's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the URL's title. Click the **Locations** link.

   The Change Location page appears.
3. In the **Sort By** field, select **Title** to display the possible containers in alphabetical order or select **Handle** to display the possible containers in numerical order.
4. Do one of the following:
   - To find specific containers, enter any part of a container title in the **Search** field. Click the **Go** button.
   - To display all containers, click **Show All**.
   - To display your favorite containers, click **Show Favorites**.
5. In the **Possible Locations** field, select the container(s) in which you want the URL to appear and click the **Add** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any containers in which you do not want the URL to appear and click the **Remove** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).

**Note:** Make sure at least one container appears in the **Selected Locations** field. Otherwise, the URL will become orphaned, which means it will not appear in any container.

7. Click **Update Locations**.

# Deleting a URL

You can delete a URL if you are the logged-in owner of the URL or a logged-in user with Manager permission to it.

After deleting a URL, it goes to your personal trashcan on My DocuShare. You can restore an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See My DocuShare for more information.

To delete a URL:

1. Locate the URL that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the URL's title. From the **Edit Selected** menu, select **Delete**.
   - From the URL's **More Actions** menu, select **Delete**.

   The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the URL, then you do not have Manager permission to the object and cannot delete it.

3. Click **Delete** to remove the URL from your site.

# 12

# DocuShare notifications


- About notifications . . . . . 12–2
- Adding a notification . . . . . 12–3
- Viewing notifications . . . . . 12–4
- Creating a recipient list for a notification . . . . . 12–5
- Viewing and changing notification properties . . . . . 12–6
- Deleting a notification . . . . . 12–7

# About notifications

A notification allows you to receive an email message when a change occurs to an object. You can add a notification for any object on your site. For example, you can add a notification for a document to have DocuShare email you when a new version of the document is uploaded. You might want to add a notification for a collection to know when new content is added to the collection.

To use notifications, your administrator must enable and set up the feature. In addition, your user account properties must include an email address.

You can add a notification for any of the following changes to an object:

**Any change**—Any change to the object.

**Something added**—A new object is added to a container.

**New document version added**—A new version of a document is uploaded.

**Something deleted**—The object is deleted.

**Properties edited**—The properties of the object are changed.

**Permissions edited**—The permissions of the object are changed.

**Change in ownership**—The owner of the object is changed.

**Location edited**—The location of the object is changed.

**Document locked or checked out**—The document is locked or checked out.

**Document unlocked**—The document is unlocked after being locked, but a new version of it was not uploaded.

**Note:** DocuShare offers feeds to site collections and other types of containers. If you are using a browser with built-in feed support or you have a feed reader installed on your computer, you can add a feed to a DocuShare container. This enables you to view updated content in the container, provided you have the necessary permissions, without having to go to the DocuShare site in your browser.

# Adding a notification

You can add a notification for an object if you are logged in and have Reader permission to the object. You can quickly add a simple notification to have DocuShare email you when new content is added to an object, or you can choose advanced options to customize the notification.

To add a notification:

1. Locate the object for which you want to add a notification.
2. Do one of the following:
   - Click the object's **Notifications** icon.
   - Click the object's **Properties** icon. Then click the **Notifications** link.
3. On the Notifications page, click **Create a New Notification**.
4. In the **Period** field, select one of the following time periods:
   - **Immediate** provides notification immediately after the event occurs.
   - **Daily** provides notification in a daily summary report.
   - **Weekly** provides notification in a weekly summary report.
5. To select advanced options, click **Show Advanced Options** and choose from the following:

   **Events of Interest**—The event or events of which you want to be notified. To select multiple events, use the CTRL key (Windows) or the Command key (Macintosh).

   **Include Recipient Activity**—Specifies whether or not to also notify the user whose action caused the notification. Select **Yes** to notify the user; otherwise, select **No**.

   **External Recipients—**The email addresses for recipients who are not registered users on the DocuShare site. Separate email addresses with a comma. This field is optional.

   **Sender**—The username that appears in the email message **From** field: **Admin** or **Owner**.

   **Notification Applies To**—If the object is a collection, specifies how to apply the notification to the collection and the objects in it.

   **Initial Permissions**—Specifies the permissions for the notification.
6. Click **Apply**.

   The notification does not appear as an object in a container. Notifications appear on the object's Notifications page.

**Note:** If you are receiving too many email messages from notifications, you can choose to not receive messages for one or more types of events for all of your notifications. Click your username on the navigation bar and use the **Suppress Notification Messages** menu on the Edit page to turn off the events you want.

# Viewing notifications

You must be logged into DocuShare and have Reader permission to the object to view its notifications.

To view an object's notifications:

1. Locate the object whose notifications you want to view.
2. Do one of the following:
   - Click the object's **Notifications** icon.
   - Click the object's **Properties** icon. Then click the **Notifications** link.

   The object's current notifications display.

# Creating a recipient list for a notification

You can create a recipient list for a notification to have DocuShare notify others when a change occurs to an object. For example, you may want co-workers to know when a new version of a document is uploaded or when an object is moved to another location.

You must be the logged-in owner of a notification or a logged-in user with Writer permission to the notification to create a recipient list.

To create a recipient list for a notification:

1. Locate the object that has the notification for which you want to create a recipient list.
2. Do one of the following:
   - Click the object's **Notifications** icon.
   - Click the object's **Properties** icon. Then click the **Notifications** link.

   The object's current notifications display.
3. Click the **Properties** icon that appears to the right of the notification you want to change.

   The View Properties page appears.
4. Click the **Recipients** link.
5. Click **Change Recipients**.
6. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
7. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
8. In the **Possible Users/Groups** field, select the accounts to add to the recipient list and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
9. In the **Selected Users/Groups** field, select any accounts that you want to remove from the recipient list and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
10. Click **Update**.

# Viewing and changing notification properties

To view an object's notification properties, you must be logged-in and have Reader permission to the object. You must be the logged-in owner of a notification or a logged-in user with Writer permission to the notification to change the notification's properties.

To view and change an object's notification properties:

1. Locate the object whose notification properties you want to view and change.
2. Do one of the following:
   - Click the object's **Notifications** icon.
   - Click the object's **Properties** icon. Then click the **Notifications** link.

   The object's current notifications display.
3. Click the **Properties** icon that appears to the right of the notification you want to change.

   The View Properties page appears.
4. Click the **Edit** link.
5. Change the properties you want. Click a field name for a description of each property.

**Note:** The **Enabled** property allows you to turn off a notification without deleting it. When you want to use the notification again, you can enable it.

6. Click **Apply**.

# Deleting a notification

You can delete a notification if you are the logged-in owner of a notification or a logged-in user with Manager permission to the notification.

After deleting a notification, it goes to your personal trashcan on My DocuShare. You can restore an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See My DocuShare for more information.

To delete a notification:

1. Locate the object whose notification you want to delete.
2. Do one of the following:
   - Click the object's **Notifications** icon.
   - Click the object's **Properties** icon. Then click the **Notifications** link.

   The object's current notifications display.
3. Click the **Properties** icon that appears to the right of the notification you want to delete.

   The View Properties page appears.
4. Click the **Delete** icon.

   The Confirm Delete page appears.
5. Click **Delete**.

# 13

# DocuShare content rules


- About content rules . . . . . 13–2
- Creating a content rule . . . . . 13–3
- Viewing content rules . . . . . 13–4
- Deleting a content rule . . . . . 13–5

# About content rules

**Only for DocuShare CPX**

A content rule allows you to have an action run automatically when a specific event occurs. For example, you can create a content rule for a collection to route any document added to the collection. Or, you can create a content rule for a document to receive an email message when a new version of the document authored by a specific user is added. You can add a content rule for any object on your site.

You can have an action run when any of the following events occur:

- **Any change**—Any change to an object.
- **Document locked or checked out**—The document is locked or is being edited.
- **Document unlocked**—The document is unlocked.
- **Location edited**—The location of an object is changed.
- **New document version added**—A document is updated with a newer version.
- **Owner changed**—The owner of an object is changed.
- **Permissions changed**—The permissions of an object are changed.
- **Properties edited**—The properties of an object are changed.
- **Routing**—A change occurred to the status of a routing task.
- **Something added**—A new object is added to a container.

# Creating a content rule

DocuShare provides a wizard to guide you in creating a content rule. Using the wizard, you provide a brief description of the content rule, select the event that triggers the action, select the action to run, and enter settings specific to the selected action.

You can create a content rule for an object if you are logged in and have Manager permission to the object.

**Note:** Avoid creating a content rule that repeats itself as it will be disabled after a certain number of repetitions. For example, if you create a content rule that changes a property (action to run) when either any change or a property change occurs (event trigger), the rule will continue to repeat until it is disabled. It is a good idea to refine the event by specifying additional options on the Content Property Conditions page.

To create a content rule:

1. Locate the object for which you want to create a content rule.
2. Do one of the following:
   - Click the object's **Content Rules** icon.
   - Click the object's **Properties** icon. Then click the **Content Rules** link.
3. On the Content Rules page, click **Create a New Content Rule**.

   The Create a New Content Rule wizard appears. The following steps describe the required fields. For information about any of the optional fields in the wizard, click the appropriate field name.
4. On the Description page, enter a **Title** for the content rule and click **Next**.
5. On the Event Triggers page, select the event that will cause the action to occur and click **Next**.
6. On the Content Property Conditions page, refine the event trigger by specifying property conditions. Then click **Next**.
7. On the Action Performed page, select the action to run when the event occurs and click **Next**.

   The Action Settings page appears. The options on the page vary depending on the action you selected in the previous step.
8. Enter the appropriate information and click **Next**.
9. On the Completion Settings page, you can choose to set a property value on the object when the content rule completes. In addition, you can append the property value to any existing property values. Then click **Done**.

   The View Properties page for the content rule appears and provides a summary of the content rule.

# Viewing content rules

You must be logged into DocuShare and have Reader permission to the object to view its content rules.

To view an object's content rules:

1. Locate the object whose content rules you want to view.
2. Do one of the following:
   - From the object's **More Actions** menu, select **Content Rules**.
   - Click the object's **Content Rules** icon.

   The Content Rules page lists the object's current content rules.
3. To view the settings of a content rule, do one of the following:
   - Click the **Properties** icon that appears to the right of the content rule.
   - Click the title of the content rule.

   The settings are read-only; you cannot change any of the settings.

**Note:** If a content rule is disabled, it is because it has run too many times due to the rule repeating itself. If you want a disabled content rule to run again, you must recreate it.

# Deleting a content rule

You can delete a content rule if you are the logged-in owner of a content rule or a logged-in user with Manager permission to the content rule.

After deleting a content rule, it goes to your personal trashcan on My DocuShare. You can restore an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See My DocuShare for more information.

To delete a content rule:

1. Locate the object whose content rule you want to delete.
2. Do one of the following:
   - From the object's **More Actions** menu, select **Content Rules**.
   - Click the object's **Content Rules** icon.

   The Content Rules page lists the object's current content rules.
3. Do one of the following:
   - Click the **Properties** icon that appears to the right of the content rule.
   - Click the title of the content rule.
4. Click the **Delete** icon in the upper-right corner of the window.

   The Confirm Delete page appears.
5. Click **Delete**.

# 14

# DocuShare searches


- About searches . . . . . 14–2
- Viewing new content on your site. . . . . 14–3
- Searching for objects . . . . . 14–4
- Running an advanced search . . . . . 14–6
- Using reserved characters in a search. . . . . 14–9
- Stop words . . . . . 14–10
- Saving a search query . . . . . .14–11
- Changing saved query properties . . . . . 14–12
- Changing the location of a saved query. . . . . 14–13
- Deleting a saved query . . . . . 14–14

# About searches

DocuShare search features enable you to quickly find objects on your site. You can perform simple word searches by having DocuShare find the objects that contain the text you specify. You also can combine several search terms to find specific objects, such as all documents authored by one user that contain the word DocuShare in their titles. When searching for objects, you can choose the scope of a search.

When an object is added to a container, DocuShare indexes and stores in a database the object's properties (also called metadata) and, if the object is a document, its content. A search checks the database to find the objects that match your search terms. In addition, DocuShare uses a process called stemming to find objects that contain variations of the word you specify. For example, a search for the word **mouse** will find the word **mice**.

# Viewing new content on your site

From any page, you can display a list of the content that has been added or changed on your site. This lets you quickly find any new or recently changed object or content that might be of interest to you.

To find out what's new:

1. On the navigation bar, click **What's New**.

   DocuShare displays the list of content that has been added or changed.

2. To change the search query used to display the list of new or changed content, click the **Refine Search** link.

   The Refine Search page appears.

3. Change any of the search properties and click the **Search** button. Click a field name for a description of the property, or see Running an advanced search on page 14–6.

**Note:** If you are a guest and you click **What's New** on the navigation bar, DocuShare lists the content that has been added or changed during the past 24 hours. If you are a logged-in user and you click **What's New** on the navigation bar, DocuShare lists the content that has been added or changed since you last clicked **What's New**.

# Searching for objects

The navigation bar provides a search area that lets you quickly search for objects and content. You do not need to be logged into DocuShare to run a search.

To run a quick search:

1. On the navigation bar, enter one or more words in the **Search** field. Separate each word with a space.

**Note:** If you want DocuShare to search for an exact phrase or a phrase that includes a logical operator such as And or Or, enclose the phrase in quotation marks (for example, “war and peace”).

If you want the search results to ***exclude*** objects that contain a word, precede that word with a minus sign (-). For example, if you want to find content on green vegetables but not broccoli, enter green vegetables -broccoli.

If you want the search results to ***include*** objects that contain a word, precede that word with a plus sign (+). For example, if you want to find content on green vegetables that definitely includes broccoli, enter green vegetables +broccoli.

2. Depending on the page from which you are running the search and whether or not your site is part of a federation, select a search scope from the **In** menu.
3. Click **Search**.

   DocuShare displays the search results. For documents, DocuShare either provides a snippet of the document content with the search term highlighted or displays the document’s abstract if the search term is not found in the content. You can click the **Show/Hide Details** button to control this display.

   If you searched all federated sites, DocuShare displays the search results from the site on which you ran the search. To display the results from the other sites in the federation, click each site name under **Select a Federation Site**.

## Search options

When running a quick search, you can specify several options to narrow the search and to control how the search results are displayed.

To run a quick search using search options:

1. Enter the search words in the **Search** field and, if the **In** field appears, select the search scope.
2. Click the small triangle next to the **Search** field and specify any of the following information:

   **Search Text Contained In**—Specifies the location of the search words. **Any Text** searches the object's content and properties.

   **Last Modified**—Limits the search to objects that were last changed within a specific time period.

   **Object Types**—Specifies the type of objects to search.

   **Document Types**—Searches for all types of documents or a specific type. The **Object Types** must be set to **All Object Types** or **Documents Only**.

   **Maximum Results**—The maximum number of objects to display in the search results list. DocuShare orders the results by displaying the most relevant objects first.

   **Sort Results**—The order in which to display the search results.
3. Click **Search**.

   DocuShare displays the search results.

# Running an advanced search

Using the Advanced Search page, you can further narrow a search by combining search terms, specifying ranges, and searching for specific objects and documents.

To run an advanced search:

1. On the navigation bar, click the **Advanced** link.
2. Under **Search Text Contained In**, enter the search term. Create a search term by selecting an operator, entering the search word or words (separate each word with a space), and then selecting where the search words should occur. If you want DocuShare to search for an exact phrase or a phrase that includes a logical operator, enclose the phrase in quotation marks (for example, “war and peace”).

   You can click **+ add search term** to create another search term using a logical operator. See Table 14–1 for a description of each logical operator.

**Note:** For information on how to use wildcard and nonalphanumeric characters in a search term, see Using reserved characters in a search on page 14–9.

3. Depending on the page from which you are running the search and whether or not your site is part of a federation, select a search scope from the **Search Within** menu.
4. In the **Maximum Results** field, select the maximum number of objects to display in the search results list. DocuShare orders the results by displaying the most relevant objects first.
5. In the **Sort Results** field, select the order in which to display the search results.
6. Under **Limit Search to Date Range**, enter the date range to use when searching for objects. Create a date range by selecting options from the menus and entering a date.

   You can click **+ add date range** to create a second date range.
7. Under **Find Results with Numeric Range**, enter the numeric range to use when searching for objects whose properties have numeric values.

   You can click **+ add numeric range** to create a second numeric range.

**Note:** This field appears if an object has a numeric property that is searchable.

8. Under **Object Types to Search**, do one of the following:
   - To search all of the objects on the site, click **Search all object types**.
   - To search specific objects only, click **Limit search to selected object types** and select the objects to search from the list.

9. If you are searching for documents, under **Document Types to Search**, do one of the following:
   - To search all types of documents, click **Search all document types**.
   - To search specific types of documents, click **Limit search to selected document types** and select the types of documents to search from the list. Each document type is specified by its MIME type.
10. Click the **Search** button.

    DocuShare displays the search results. For documents, DocuShare either provides a snippet of the document content with the search term highlighted or displays the document's abstract if the search term is not found in the content. You can click the **Show/Hide Details** button to control this display.

    If you searched all federated sites, DocuShare displays the search results from the site on which you ran the search. To display the results from the other sites in the federation, click each site name under **Select a Federation Site**.

Table 14–1: Logical operators

| Logical operator | Meaning |
|---|---|
| And | **Searches for objects that contain all of the search terms.**<br>For example: Search for objects where "Title contains Training **And** Summary contains Basic Product."<br>The search would return only objects that have the word "Training" in the Title, and the phrase "Basic Product" in the Summary. |
| Or | **Searches for objects that contain one of the search terms.**<br>For example: Search for objects where "Title contains Advanced **Or** Summary contains Administrator."<br>The search would return objects that have either the word "Advanced" in the Title or the word "Administrator" in the Summary, or both the word "Advanced" in the Title and "Administrator" in the Summary. |
| Accrue | **Searches for objects that contain at least one of the search terms, and relevance ranks the results by displaying the objects that contain the largest number of search terms first.**<br>For example: Search objects where "Title contains Advanced **Accrue** Summary contains Administrator."<br>The search would first return objects that have both Advanced in the Title and Administrator in the Summary, then objects that contain just one of the search terms (either Advanced in the Title or Administrator in the Summary). |

Table 14–1: Logical operators

| Logical operator | Meaning |
|---|---|
| And Not | **Searches for objects that contain one search term and not the other.**<br>For example: Search objects where “Title contains Technology **And Not** Title contains Marketing.”<br>The search would return only those objects where Technology was in the Title, but not return objects if Marketing was also in the Title. |

# Using reserved characters in a search

You can use these wildcard characters when building a search:

**Question mark (?)**—Specifies any single alphanumeric character.
For example: **?an** returns ban, can, dan, fan, etc.

**Asterisk (*)**—Specifies any number of alphanumeric characters.
For example: **corp*** returns corporal, corporate, corporation, corpulent, etc.

**Note:** To find objects that include a wildcard character, use the equals operator, precede the character with two backslashes (\\), and select the specific property name. For example, to search for a document named *ReadFirst enter: **equals *ReadFirst** *In* **Title**.

To find objects that include non alphanumeric characters, such as at signs (@) and equal signs (=), or nonalphanumeric and wildcard characters, select the specific property name, use the equals operator, and enclose the search text within single quotation marks.

**Example**: To search for jbrown@mycompany.com, enter:

**equals 'jbrown@mycompany.com'** *In* **(User) Email Address**

**Example**: To search for jbrown@* enter:

**equals 'jbrown@*'** *In* **(User) Email Address**

**Note:** Three nonalphanumeric characters, the ampersand (&), dash (-), and underscore (_), are considered alphanumeric characters and do not require any special treatment. For example, to search for my_document.doc, enter **my_document.doc**.

# Stop words

To speed up the search results display, DocuShare ignores certain common words, referred to as stop words. Therefore, you do not need to enter the words when running a search. However, if you want DocuShare to search for a stop word, enclose the word in quotation marks.

The stop words are listed in Table 14–2.

Table 14–2: Stop words

| | | |
|---|---|---|
| a | had | that |
| also | has | the |
| an | have | there |
| and | how | to |
| any | I | too |
| am | I'm | want |
| are | if | was |
| as | in | were |
| at | is | what |
| be | it | when |
| but | its | where |
| can | it's | whether |
| did | like | which |
| do | not | who |
| does | of | whose |
| find | on | why |
| for | or | will |
| from | should | with |
| get | so | would |
| got | than | <or> |

# Saving a search query

After running an advanced search, you can save the search query so you can run the same search again at a later time or share it with other users. To save a search query, you must be logged in.

To save the query used in a search:

1. Define your search terms and run a search.

   The search results display.

2. From the **Add** menu, select **Saved Query**.

   The Add Saved Query page appears.

3. In the **Title** field, enter a title for the saved query.
4. Enter any optional information. Click a field name for a description of each property.
5. Click **Save Search**.

   The Locations page appears.

6. Do one of the following:

   - To find specific containers, enter any part of a container title in the **Search** field. Click the **Go** button.
   - To display all containers, click **Show All**.
   - To display your favorite containers, click **Show Favorites**.

7. In the **Possible Locations** field, select the container(s) in which you want the saved query to appear and click the **Add** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).
8. In the **Selected Locations** field, select any containers in which you do not want the saved query to appear and click the **Remove** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).
9. Click **Update Locations**.

   DocuShare adds your search query to the container. When you click the saved query, DocuShare runs the search using the saved search terms and displays the results.

# Changing saved query properties

You can change the properties and search terms of a saved query if you are the logged-in owner of the query, or you are logged in and have Writer permission to it.

To change a saved query's properties:

1. Locate the saved query whose properties you want to change.
2. Click the **Properties** icon that appears to the right of the saved query's title.
3. On the View Properties page, click the **Edit** link.
4. Change the properties you want.
5. Click **Apply**.
6. Click the **Edit Query** link.
7. Change the search terms you want.
8. Click **Apply**.

   DocuShare saves the changes to the saved query.

## Viewing the change history

**Only for DocuShare CPX**

DocuShare keeps track of all the changes to site objects, which provides an audit trail of the changes to objects. You can view the changes to any object to which you have Reader permission.

To view the change history:

1. Locate the saved query whose change history you want to view.
2. Click the saved query's **Properties** icon.
3. On the View Properties page, click the **Change History** link.
4. From the **Change** menu, select the type of change you want to view.
5. Do one of the following:
   - Enter part of a name in the **Search for User** field and then choose the user from the **Select User** menu.
   - Click **Show All** and then choose the user from the **Select User** menu.
   - Choose **All** from the **Select User** menu.
6. From the **Show Last** menu, select the number of change events to display.
7. To display the activity during a specific date range, enter start and end dates.
8. Click **Go**.

   Information about the change displays. You can click **Show as XML** to convert the information to Extensible Markup Language (XML) format for use with other applications.

# Changing the location of a saved query

You can move a saved query to another container or have the saved query appear in several containers on your site. Although a saved query can appear in several containers, there is only one copy of it, which saves space on your DocuShare site.

To change a saved query's location, you must be logged in and have Writer permission to both the saved query and the new container.

**Note:** You can also use the **Copy**, **Cut**, and **Paste** commands to change the location of a saved query. See Editing multiple objects in a collection on page 3–7.

To change a saved query's location:

1. Locate the saved query whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the saved query's title. From the **Edit Selected** menu, select **Change Location**. On the Confirm Change Location page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the saved query's title. Click the **Locations** link.
3. In the **Sort By** field, select **Title** to display the possible containers in alphabetical order or select **Handle** to display the possible containers in numerical order.
4. Do one of the following:
   - To find specific containers, enter any part of a container title in the **Search** field. Click the **Go** button.
   - To display all containers, click **Show All**.
   - To display your favorite containers, click **Show Favorites**.
5. In the **Possible Locations** field, select the container(s) in which you want the saved query to appear and click the **Add** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any containers in which you do not want the saved query to appear and click the **Remove** button. To select multiple containers, use the CTRL key (Windows) or the Command key (Macintosh).

**Note:** Make sure at least one container appears in the **Selected Locations** field. Otherwise, the saved query will become orphaned, which means it will not appear in any container.

7. Click **Update Locations**.

# Deleting a saved query

You can delete a saved query if you are the logged-in owner of the query or a logged-in user with Manager permission to it.

After deleting a saved query, it goes to your personal trashcan on My DocuShare. You can restore an object from your personal trashcan as long as your administrator has not expunged the object from the site-wide trashcan. See My DocuShare for more information.

To delete a saved query:

1. Locate the saved query that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the saved query's title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the saved query's title. On the View Properties page for the saved query, click the **Delete** button.

   The Confirm Delete page appears.
3. Click **Delete** to remove the saved query from your site.

# 15

# My DocuShare


- About My DocuShare . . . . . 15–2
- Managing favorites . . . . . 15–3
- Using your personal collection . . . . . 15–4
- Using your personal calendar . . . . . 15–5
- Using your personal trashcan . . . . . 15–6
- Viewing your online meetings . . . . . 15–7
- Viewing your groups . . . . . 15–7
- Viewing your routing tasks . . . . . 15–7

# About My DocuShare

My DocuShare provides a single location from which you can conveniently manage personal content as well as access the content on your site. A link to My DocuShare appears on the site home page, on the navigation bar, and under **My Links** on the page footer.

My DocuShare consists of areas called portlets; each portlet has a different use. You can close a portlet and reopen it by clicking the small triangle next to the portlet title.

- **Personal Collection**—A collection for private content.
- **Workspaces**—The workspaces you have access to and own. (*DocuShare CPX only*)
- **Site Home**—The top level collections on your site.
- **Favorite Calendars**—A combination of the calendars in your Favorites.
- **Personal Trashcan**—Your deleted objects.
- **Favorites**—Links to your frequently used objects.
- **Online Meetings**—The online meetings you scheduled. (*DocuShare CPX only*)
- **My Groups**—The groups of which you are a member.
- **Tasks**—The routing tasks assigned to you.

In addition, you can access your background jobs from My DocuShare. When you change the permissions of a container and its objects, the change occurs in the background. If you have any background jobs, a link appears under the navigation bar; you can click the link to check the status of and delete background jobs.

# Managing favorites

To conveniently access frequently used objects from a single location, you can add them to your favorites. Any object you add as a favorite is a link to the original object, not a copy. If the original object is deleted, it will no longer appear in your favorites.

To add an object to your favorites:

1. Locate the object that you want to add to favorites.
2. Do one of the following:
   - Click the object's **Add to Favorites** icon.
   - Click the checkbox that appears next to the object's title. From the **Edit Selected** menu, select **Add to Favorites**.
3. On the Confirm Add to Favorites page, click **Confirm**.
4. Go to **My DocuShare**.

   The object you added appears under **Favorites**. The **View** menu lets you display one type of favorite object, such as favorite documents. You can click the **Favorites** heading to display your favorites in a collection listing. In this view you can use standard collection features.

To remove an object from your favorites:

1. Go to **My DocuShare**.
2. Click the **Favorites** heading.
3. From the **Edit Selected** menu, select **Remove Favorite**.
4. On the Confirm Remove from Favorites page, click **Confirm**.

   The object no longer appears in favorites. However, the object still appears in its original location(s).

# Using your personal collection

Your personal collection on My DocuShare is a private repository for your objects. By default, only you and a group of administrators called Content Administrators have full access to the collection.

To add an object to your personal collection:

1. Go to **My DocuShare**.
2. Click the **Personal Collection** heading.
3. From the **Add** menu, select the type of object you want to add.
4. On the Add page, enter the required information and click **Apply**.
5. Go to **My DocuShare**.

   The object you added appears under **Personal Collection**. The **View** menu lets you display one type of object, such as documents.

**Note:** You also can add an object to your personal collection using an object's Locations page. Display and select you personal collection in the **Possible Locations** field and then click the **Add** and **Update Locations** buttons.

To view your personal collection in full page:

1. Go to **My DocuShare**.
2. Click the **Personal Collection** heading.

   The objects display in a collection listing. In this view you can use standard collection features such as adding new objects and changing the collection's properties.

**Note:** You can delete your personal collection and, optionally, its contents. However, the next time you access **My DocuShare** your personal collection appears.

# Using your personal calendar

Your personal calendar is a combination of all your favorite calendars. This allows you to merge the events from separate calendars into a master calendar. For example, you can add individual vacation calendars to your favorites to create a single vacation calendar for a group.

To create a personal calendar:

1. Locate the calendar that you want to add to favorites.
2. Do one of the following:
   - Click the calendar's **Add to Favorites** icon.
   - Click the checkbox that appears next to the calendar's title. From the **Edit Selected** menu, select **Add to Favorites**.
3. On the Confirm Add to Favorites page, click **Confirm**.
4. Repeat steps 1 through 3 to add additional calendars to favorites.
5. Go to **My DocuShare**.

   The single, personal calendar appears under **Favorite Calendars**.
6. Using the **View** menu, you can switch between daily and weekly views of the calendar.

# Using your personal trashcan

Your personal trashcan holds both the objects you delete as well as the objects you own that other users delete. You can use your personal trashcan to restore a deleted object. Only your administrator can expunge deleted objects.

To restore a deleted object:

1. Go to **My DocuShare**.
2. Under **Personal Trashcan**, select the object that you want to restore.
3. Click the **Go** button next to **Restore**.

   The object is restored to the location from which it was deleted.

**Note:** If the location is a collection or workspace (*DocuShare CPX only*) and it was deleted, then the object is restored to your personal collection. If the location is a non-collection type of container (such as a calendar or a discussion) and it was deleted, then the object becomes an orphaned object; your administrator can relocate an orphaned object.

# Viewing your online meetings

**Only for DocuShare CPX**

The meetings you schedule display under the **Online Meetings** heading. You can click a meeting name to join the online meeting. See Online meetings for information on using the online meetings feature.

# Viewing your groups

All of the groups of which you are a member display under the **Groups** heading. You can click a group name to display its Properties page.

# Viewing your routing tasks

All of the routing tasks assigned to you are listed under the **Tasks** heading. This provides you with a quick view of the tasks to which you need to respond. You can click a task to open its window.

In addition, clicking the **Tasks** heading displays the My Tasks window. You can view both the tasks assigned to you and the tasks you assigned, and your routing task history in this window. For more information on document routing, see Routing documents.

# 16

# Online meetings


- About online meetings . . . . . 16–2
- Scheduling an online meeting . . . . . 16–3
- Launching an online meeting . . . . . 16–5
- Joining an online meeting . . . . . 16–6
- Deleting an online meeting. . . . . 16–7

# About online meetings

**Only for DocuShare CPX**

DocuShare is integrated with WebEx™ Meeting Center, which allows you to schedule and attend online meetings with other DocuShare users. Using a Web browser you can easily and cost-effectively communicate with co-workers regardless of their geographic location.

**Note:** To use online meetings, your administrator must configure the server to allow Javascript. Your user account properties must have **Enable Javascript** set to **Yes**.

# Scheduling an online meeting

You schedule an online meeting by specifying the meeting information and selecting the attendees. When you are finished, an email message is sent to each attendee with the information needed to join the meeting.

An online meeting is associated with a collection or a workspace as two URLs are added to the container after the meeting is created: one URL is for the meeting host and the second URL is for the meeting attendees.

To schedule an online meeting:

1. Locate and open a site collection or workspace.
2. Click the **Meet Online** icon in the upper-right corner of the window.
3. If the WebEx Login Page appears, enter your WebEx login information and click the **Login** button.

   The WebEx Login Page appears if you have not logged into the WebEx meeting site during your current DocuShare session.
4. On the Properties page, enter the following information:

   **Meeting Name**—The name of the meeting.

   **Meeting Passcode**—The passcode required to join the meeting.

   **Start Date**—The date of the meeting. **Immediately** schedules the meeting right away.

   **Start Time**—The meeting start time.

   **Duration**—The length, in minutes, of the meeting.

   **Time Zone**—The time zone in which the meeting is to occur.

   **Invitation Text** (optional)—The meeting invitation message.
5. Click **Next** to go the Attendees page.
6. In the **Your Email** field, enter the email address from which the meeting invitation will be sent.
7. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
8. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
9. In the **Possible Users/Groups** field, select the accounts to add to the list of recipients and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
10. In the **Selected Users/Groups** field, select any accounts that you want to remove from the list of recipients and click the **Remove** button.

11. To invite external attendees, do the following:
    a. In the **Email** field, enter the email address of the person you want to invite.
    b. Click the **Add** button.
    c. Repeat steps a and b for each person.
    d. To remove a person from the **Selected Users** field, select the person's email address and click **Remove**.
12. Click **Create**.

    The Summary page appears and displays the meeting creation status.
13. Click **OK**.

    Two meeting URLs are added to the container. The meeting URLs for a workspace are located in a meetings collection in the content portlet.

# Launching an online meeting

All of the online meetings you scheduled display on My DocuShare. This lets you conveniently access your meetings from one location.

To launch a scheduled meeting:

1. Go to My DocuShare.
2. If **Log in to display meetings** appears under Online Meetings, click the link to log into WebEx.

   The meetings you scheduled display under Online Meetings.
3. Click the meeting that you want to launch.

   The WebEx Meeting Manager window opens.

**Note:** You also can launch an online meeting by clicking the meeting **Host URL** that is located in the container from which you scheduled the meeting.

# Joining an online meeting

Each attendee receives an email message with a link to the online meeting, the meeting passcode, and any additional information the host provides.

To join a meeting as an attendee:

1. Open the email message that contains the meeting invitation.
2. Do one of the following:
   - Click the **WebEx Join URL** link.
   - Click the collection link. In the open collection, click the meeting name.

**Note:** You also can join an online meeting by opening the container that contains the **Join URL** for the meeting and clicking the meeting name.

# Deleting an online meeting

You can delete the online meeting from the WebEx server (which also deletes the meeting URLs from DocuShare) and you can delete the online meeting URLs from your DocuShare site. To delete an online meeting, you must be the logged-in owner of the meeting or a logged-in user with Manager access to it.

To delete an online meeting from the WebEx server:

1. Go to My DocuShare.
2. Under Online Meetings, click the **Delete** icon next to the meeting that you want to delete.
3. Click **Delete** to remove the meeting from the WebEx server and the meeting URLs from DocuShare.

To delete the online meeting URLs from DocuShare:

1. Locate the online meeting that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the meeting's title. From the **Edit Selected** menu, select **Delete**.
   - From the meeting's **More Actions** menu, select **Delete**.

   The Confirm Delete page appears.

**Note:** If a minus sign appears in the checkbox that precedes the meeting, then you do not have Manager access to the object and cannot delete it.

3. Click **Delete** to remove the meeting URLs from DocuShare. The meeting is not removed from the WebEx server.

# 17

# Routing documents


- About routing documents . . . . . 17–2
- Routing a document . . . . . 17–3
- Setting up a collection for routing documents . . . . . 17–6
- Checking the status of routing tasks you assigned . . . . . 17–7
- Viewing the tasks assigned to you . . . . . 17–11
- Viewing your deleted tasks . . . . . 17–14
- Viewing the routing tasks of a document . . . . . 17–15

# About routing documents

During a document's development cycle, you often need to solicit feedback from others, receive approval of the document's content, or simply share the information in the document. DocuShare enables you to automate the routing of documents to users and request a specific action after the users receive the documents.

On a form called a Routing Slip, you indicate the users to whom the document should be sent, the type of action you want the users to take, and a message describing the document task. You then submit the Routing Slip; DocuShare notifies the specified users of the document task. While a task is in progress, you can monitor its status.

# Routing a document

You can route an existing document on your site or you can choose to route a document when adding it to DocuShare. In addition, you can route an individual document version. On the Routing Slip that accompanies the document, you can request users to approve the document, review the document and provide changes, or acknowledge receipt of the document, or you can provide the document for information only.

When creating a routing task, you can define a single routing step or several sequential steps. A single routing step consists of one type of action, such as sending a document to users for approval. A multi-step routing task enables you to automate a document process. For example, you can create a routing task to send a document to a group of users for their review and comment before sending the revised document for approval.

To route a document:

1. Do one of the following:
   - **To route a single document**, locate the document or document version that you want to route and click its **Route** icon. A **Route** icon does not appear if the document is locked.
   - **To route several documents**, locate the documents and click the checkbox next to each document. From the **Edit Selected** menu, select **Route**. On the Confirmation page, click **Confirm**.
   - **To route a document after adding it to DocuShare**, select **Document** from the **Add** menu. Enter the required information and click **Publish and then route the document** before clicking **Apply**.
   - **To route a document before it appears in DocuShare**, select **Document** from the **Add** menu. Enter the required information and click **Route the document and publish it later** before clicking **Apply**.

   A Routing Slip appears.
2. If you want to include another document, click the **Add** button. Locate the document and click its **Route** command; then confirm adding the document to the Routing Slip.
3. If you want to use a saved Routing Slip, do one of the following and then go to step 19:
   - Select one of your saved Routing Slips and click **Load**.
   - Click **View all Saved Routing Slips** to display your saved Routing Slips and the public Routing Slips saved by all site users. Select a Routing Slip.
4. Under **Routing Action**, choose one of the following:
   - **Approve or Disapprove**—Requires users to approve or not approve the document.
   - **Review and Make Changes**—Allows users to provide comments and a revised version of the document. Click **Share Changes with Recipients** if you want each recipient to see the previous recipient's changes.
   - **Acknowledge Receipt**—Provides the document to users for information and requires the users to confirm receiving the document.
   - **Information**—Provides the document to users for information only.

5. Depending on the routing action you selected, choose one of the following **Routing Orders**:
   - **In Order**—Routes the document to users in the order in which they are listed in the **Selected Users/Groups** field. If a user does not approve the document, it is not routed to subsequent users.
   - **At the Same Time-Single Reply**—Routes the document to all users simultaneously and only one user's reply is needed to complete the routing task.
   - **At the Same Time-All Reply**—Routes the document to all users simultaneously and all users must reply to complete the routing task.
   - **At the Same Time-Majority Reply**—Routes the document to all users simultaneously and more than half of the users must reply to complete the routing task.
6. Under **Routing Message**, do the following:
   - In the **Subject** field, enter a brief topic that appears in the notification or email that the user receives.
   - In the **Comments** field, enter a message.
7. Click **Next** to go to the Add Recipients page.
8. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
9. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
   - To display your favorite accounts, click **Show Favorites**.
10. In the **Possible Users/Groups** field, select the accounts to add to the list of recipients and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
11. In the **Selected Users/Groups** field, select any accounts that you want to remove from the list of recipients and click the **Remove** button.
12. To show the members in a group, select the group in the **Selected Users/Groups** field and click **Show Group Members**. The group members replace the group title and the routing task is sent to each user and not to the group.
13. To reorder the recipients in the **Selected Users/Groups** field, select an account and do one of the following:
    - To move the recipient before another recipient, click **Move Up**.
    - To move the recipient after another recipient, click **Move Down**.
14. Click **Next** to go to the Choose Escalation and Notification page (the page does not appear if you are routing the document for information).
15. Select **If Not Complete** and do the following:
    - To specify a completion date, select **By** and enter a date or select **Within** and specify a time period.

- To specify an escalation action if the routing task is not complete by the specified date, choose an action from the **Then Escalate** menu.

16. Under **Notify Me**, choose any of the following:
    - **Of Escalation**—Notifies you of the escalation action.
    - **Of Task Progress**—Notifies you of the routing status after each user action.
    - **When Task Is Complete**—Notifies you when each routing step is complete.

    To check for notifications, click the **My Tasks** link on the navigation bar and select **Tasks Assigned to Me**.
17. Click **Done** and review the routing information for the task on the Routing Step Review page.
18. To save the Routing Slip, click **Save Routing Slip**. Enter a name for the Routing Slip and keep **Save as private** selected if you do not want to share the Routing Slip with other users. Then click **OK**.
19. Do one of the following:
    - Click **Submit** to start the routing task.
    - Click **Back** to change any of the routing information.
    - Click **Add Step** to add another step to the routing task.

**Note:** If you chose **Route the document and publish it later** in step 1, you must publish the document for it appear in DocuShare. For information on how to publish the document, see Checking the status of routing tasks you assigned on page 17–7.

# Setting up a collection for routing documents

You can have any document added to a collection automatically routed by associating one of your saved, private Routing Slips with the collection.

To use a Routing Slip with a collection:

1. Locate the collection you want to use for routing documents.
2. Click the **Properties** icon that appears to the right of the collection's title.
3. Click the **Edit** link.
4. In the **Route Before Publishing** field, select **Yes** to route the document before it is added to the collection.
5. In the **Use Routing Slip** field, select the Routing Slip that you want to use.
6. Click **Apply**.

# Checking the status of routing tasks you assigned

You can check the status of completed and pending routing tasks that you assigned to other users. Once a task is complete, you can choose to delete it, keep a record of it, or publish the document to add it to DocuShare.

To check the status of a routing task:

1. Do one of the following:
   - On the navigation bar, click **My Tasks**.
   - On the navigation bar, click **My DocuShare**. Then click **Tasks**.

   The My Tasks window appears.
2. From the **Show** menu, select **Tasks Assigned by Me**.

   The page lists the routing tasks, under Description, the date the task began, and the status. Table 17–1 describes the status information.

Table 17–1: Task status

| Status | Description |
|---|---|
| Approved | The single-step task or one step of a multi-step task is complete and the recipient(s) approved the document(s). |
| Disapproved | The single-step task or one step of a multi-step task is complete and the recipient(s) did not approve the document(s). |
| Reviewed | The single-step task or one step of a multi-step task is complete and the recipient(s) reviewed the document(s). |
| Acknowledged | The single-step task or one step of a multi-step task is complete and the recipient(s) acknowledged receiving the document(s). |
| Delivered | The single-step task or one step of a multi-step task is complete and the recipient(s) received the document(s) for their information. |
| All Steps Completed | The multi-step task is complete. |
| Started | The task is pending. It is currently being routed to all recipients at the same time for approval, review, or acknowledgement. |
| Username | The task is pending. It is currently being routed to all recipients in order; the user whose name is displayed has received the document, but has not taken any action. |
| Step # | The task is pending and is on a specific step of a multi-step task. |

Table 17–1: Task status

| Status | Description |
|---|---|
| Step #: Username | The task is pending and is on a specific step of a multi-step task. It is currently being routed to all recipients in order; the user whose name is displayed has received the document, but has not taken any action. |
| Overdue | For a single-step task or one step of a multi-step task that is overdue, the word Overdue appears after the task's description. |
| Terminated | The task is stopped because it cannot continue. This can occur when **Cancel Task** is set for **Then Escalate** or when a document or user is deleted from your site. |

3. To view more information about the task, click the task's description.

   A Report on Routing window appears, which shows the status of each user assigned the task.

4. Do one of the following:

   - To view an individual recipient's comments, click the user's name.
   - To view all recipient comments, click **Show all User Comments**. If you want, you can save the comments to a text file.

   Close the window after viewing the comments.

5. To view the user's changes to the document, click the document's title.
6. Close the document after viewing the changes. Then close the Response to Routing window.
7. If the task is complete, do one of the following:

   - To move a task from the **Tasks Assigned by Me** list to your **Deleted Tasks**, click **Delete This Job**.
   - To complete the task later, click **Keep for Later**. The task remains in the **Tasks Assigned by Me** list.
   - To publish a document that has not been added to DocuShare (the word Unpublished appears after the document's title), click the **Properties** icon that appears to the right of the document's title. At the bottom of the View Properties page, click the **Publish This Version** button.

     If the document was routed for approval and it was not approved, you can reroute the unpublished document by clicking the **Route** icon that appears to the right of the document's title.

## Viewing progress reports

If you chose to be notified of a task's progress, completion, or overdue status on the Routing Slip, you can view the notifications in the Routing Tasks window.

To view a task's progress report:

1. Do one of the following:
   - On the navigation bar, click **My Tasks**.
   - On the navigation bar, click **My DocuShare**. Then click **Tasks**.

   The My Tasks window appears.
2. From the **Show** menu, select **Tasks Assigned to Me**.

   The page lists the routing tasks, under Description, the date the task was assigned, and the type of report. Table 17–2 describes the report types.

Table 17–2: Report type

| Type | Description |
|---|---|
| Response | The recipient responded to the task. |
| Completion | The task is complete. |
| Overdue | The task is in progress past the completion date. |
| Termination | The task is stopped because it cannot continue. This can occur when a document or user is deleted from your site. |

3. To view a task's progress report, click its Description.

   A Response to Routing window appears, which includes the routed document and shows the user's comments.
4. To view the user's changes to the document, click the document's title.

   You can save the user's revised document as a new version of your routed document. See the next section, Publishing a new version of your routed document on page 17–10.
5. Close the document after viewing the changes.
6. In the Response to Routing window, do one of the following:
   - To schedule a new due date for an overdue task, enter a new date in the **Due Date** field and click the **Acknowledged** button.
   - To confirm reviewing the report, click the **Acknowledged** button.
   - To review the report at a later time, click the **Acknowledge Later** button.

## Publishing a new version of your routed document

If you routed a document for review, you can save a document that a recipient changed as a new version of your routed document. In the For Your Review window, the word New appears after the title of a document that a recipient changed.

To publish a new version of your routed document:

1. In the My Tasks window, select **Tasks Assigned by Me**.
2. Under **Description**, click the task that includes the changed document.
3. In the Report on Routing for Review window, click the name of the recipient who provided the changed document.
4. Click the document title to open it.
5. Save the document to a location on your computer, and then close the document window.
6. In the Report on Routing for Review window, click the **Close** button.
7. Click the **Properties** icon that appears to the right of the document's title.
8. At the bottom of the View Properties page, click the **Publish New Version** button.
9. On the Add Version page, click the **Browse** button.
10. Navigate to the location on your local drive in which you saved the document in step 5, select it, and click **Open**.

    The path to the document appears in the **Filename** field.
11. Optionally, change the document title and add a version comment.
12. Click **Apply**.
13. If a document version other than the latest is the preferred version, you are asked if you would like to set this version as the preferred version. Click **Yes** to change the preferred version; otherwise, click **No**.

    For more information on document versions and the preferred version, see Managing document versions on page 4–10.
14. Click the **Report on Routing for Review** link in the **Location** path.
15. In the Report on Routing for Review window, do one of the following:
    - To move the task from the **Tasks Assigned by Me** list to your **Deleted Tasks**, click **Delete This Job**
    - To remove the task later, click **Keep for Later**. The task remains in the **Tasks Assigned by Me** list.

# Viewing the tasks assigned to you

The tasks assigned to you display in the My Tasks window or on My DocuShare. If you chose to receive an email message when a new task is assigned to you, the message includes a URL to the task.

**Note:** To receive an email message when a new task is assigned to you, your user account property **Routing Task Notification** must be set to **Email** and your email address must appear in the **Email Address** field.

To view the tasks assigned to you:

1. Do one of the following:
   - On the navigation bar, click **My Tasks**. From the **Show** menu, select **Tasks Assigned to Me**. Any task marked **Request** is a task assigned to you.
   - On the navigation bar, click **My DocuShare**. The tasks assigned to you display under **Tasks**.
2. Click a task to view it.

   A window appears displaying your task. The following sections describe how to respond to routing tasks.

## Approving or disapproving a document

1. In the For Your Approval window, click the document's title.

   The document opens in its native editor or a window appears allowing you to download the document.

**Note:** If the document version sent to you is not the latest version, a **Latest published version** link is included. You can click the link to view the latest version of the document.

2. Review the document.
3. When your review is complete, close the document.
4. You can repeat steps 1 through 3 for each routed document.
5. In the **Comments** field, enter an optional message.
6. Click **Save as private** if you do not want other recipients to view your comments.

7. Do one of the following:
   - To complete the task and approve the document, click the **Approved** button. The task is removed from the Tasks Assigned to Me list.
   - To complete the task but not approve the document, click the **Disapproved** button. The task is removed from the Tasks Assigned to Me list.
   - To not complete the task at this time, click the **Respond Later** button. The task remains in the Tasks Assigned to Me list.

## Reviewing a document

1. In the For Your Review window, click the document's title.

   The document opens in its native editor or a window appears allowing you to download the document.

**Note:** If the document version sent to you is not the latest version, a **Latest published version** link is included. You can click the link to view the latest version of the document.

2. Review the document and make any changes you want.
3. Close the document and, if you made changes, save it to a location on your computer.
4. If you changed the document, do the following:
   a. Click the **Properties** icon that appears to the right of the document's title.
   b. At the bottom of the View Properties page, click the **Add Draft Version** button.
   c. On the Add Version page, click the **Browse** button.
   d. Navigate to and select the document you changed, and then click **Open**.
   e. Optionally, change the document title and add a version comment.
   f. On the Add Version page, click **Apply**.
   g. If a document version other than the latest is the preferred version, you are asked if you would like to set this version as the preferred version. Click **Yes** to change the preferred version; otherwise, click **No**.
   h. On the View Properties page, click the **For Your Review** link in the **Location** path.
5. You can repeat steps 1 through 4 for each routed document.
6. In the **Comments** field, enter an optional message.
7. Click **Save as private** if you do not want other recipients to view your comments.
8. Do one of the following:
   - To complete the task and remove it from the Tasks Assigned to Me list, click the **Reviewed** button.
   - To not complete the task at this time, click the **Review Later** button. The task remains in the Tasks Assigned to Me list.

## Acknowledging receipt of a document

1. In the For Your Acknowledgement window, click the document's title.

   The document opens in its native editor or a window appears allowing you to download the document.

**Note:** If the document version sent to you is not the latest version, a **Latest published version** link is included. You can click the link to view the latest version of the document.

2. When you are finished viewing the document, close it.
3. You can repeat steps 1 and 2 for each routed document.
4. Do one of the following:
   - To complete the task and remove it from the Tasks Assigned to Me list, click the **Acknowledged** button.
   - To not complete the task at this time, click the **Acknowledge Later** button. The task remains in the Tasks Assigned to Me list.

## Removing a document sent for information

1. In the For Your Information window, click the document's title.

   The document opens in its native editor or a window appears allowing you to download the document.

**Note:** If the document version sent to you is not the latest version, a **Latest published version** link is included. You can click the link to view the latest version of the document.

2. When you are finished viewing the document, close it.
3. You can repeat steps 1 and 2 for each routed document.
4. Do one of the following:
   - To complete the task and remove it from the Tasks Assigned to Me list, click the **Remove** button.
   - To not complete the task at this time, click the **Remove Later** button. The task remains in the Tasks Assigned to Me list.

# Viewing your deleted tasks

After you delete a completed task that you assigned by clicking the **Delete This Job** button, DocuShare saves the task. This provides you with a record of the completed routing tasks you assigned.

In addition, you can view the deleted routing tasks of a specific document. See Viewing the routing tasks of a document on page 17–15.

To view all of your deleted tasks:

1. Do one of the following:
   - On the navigation bar, click **My Tasks**.
   - On the navigation bar, click **My DocuShare**. Then click **Tasks**.

   The My Tasks window appears.
2. From the **Show** menu, select **Deleted Tasks**.

   Your deleted routing tasks display.

# Viewing the routing tasks of a document

The routing task owner and each recipient can view the routing status of a document or any of its versions on the Routing page for the document. The page displays both tasks in progress and deleted tasks.

To view a document's routing tasks:

1. Do one of the following:
   - Locate the document whose tasks you want to view.
   - Open a routing report or request window that contains the document whose tasks you want to view.
2. Click the **Properties** icon that appears to the right of the document's title.

   The View Properties page appears.
3. Click the **Routing** link.

   The tasks and their status display.

# 18

# Scanning documents


- About scanning documents . . . . . 18–2
- Scanning documents using scan cover sheets . . . . . 18–3
- Scanning documents to a temporary scan collection . . . . . 18–5

# About scanning documents

You can add documents to your DocuShare site by scanning them. DocuShare provides two methods for scanning documents:

- You can use a scan cover sheet to scan documents to specific locations and as new document versions. At a multifunction device, you scan a cover sheet with a document to convert it to PDF format and add the digital document to DocuShare as specified in the cover sheet.
- You can scan documents to a temporary scan collection that your administrator sets up on your site. Using a Xerox WorkCentre with the Scan to File feature, you scan a document to convert it to TIFF format and add the digital document to the temporary scan collection. You then save the scanned document to a permanent collection on your site.

Your administrator determines which method you can use for scanning documents. Therefore, check with your administrator to find out how your site is set up.

# Scanning documents using scan cover sheets

You can scan documents to specific locations and as new document versions using scan cover sheets. You can create scan cover sheets for these types of objects:

- documents—to scan a document as a new document version
- collections—to scan a document to a collection (*DocuShare CPX only*)
- workspaces—to scan a document to the content portlet of a workspace (*DocuShare CPX only*)
- user—to scan a document to your personal collection

When you create a scan cover sheet, information about the scan location and the cover sheet owner is stored in a **DataGlyph** on the cover sheet. You place the cover sheet on top of a document and scan both to add the resulting PDF document to DocuShare.

In addition, you can choose to create a cover sheet for a document when using the Add Document page to upload a document. For more information, see Adding a document on page 4–3.

## Creating a scan cover sheet

You can create a scan cover sheet if your are logged in and have Writer permission to the object.

To create a scan cover sheet:

1. Do one of the following:
   - To create a cover sheet for a document, collection, or workspace, locate the object. Then click the object's **Properties** icon.
   - To create a cover sheet for your personal collection, click your username on the navigation bar.
2. On the View Properties page, click the **Scan Cover Sheet** link.
3. Click the **Create Scan Cover Sheet** link.

   The cover sheet is created and opens in a separate window.
4. Print the cover sheet. Then close it.

   The Scan Cover Sheet page lists the cover sheet and provides the date and time at which it was created.

## Scanning a document with a scan cover sheet

If you have access to a multifunction device that supports Scan to File, you can scan a cover sheet with a document to add a PDF version of the document to DocuShare.

**Note:** Since the user interface for multifunction devices can vary, the following procedure provides general steps for scanning a document to DocuShare.

To scan a document:

1. Put the cover sheet on top of a document and place the pages in the document feeder.
2. Display the scan to file screen.
3. Follow any instructions specific to the type of device.
4. Press the **Start** button.

   The device scans the document and then adds it to DocuShare as specified in the cover sheet.

## Deleting a scan cover sheet

When you no longer want a cover sheet to be used to scan a document, you can delete it. Deleting the cover sheet invalidates any printed copies of it. You might want to delete a cover sheet if you misplace it and do not want anyone else to use the cover sheet.

To delete a scan cover sheet:

1. Locate the object whose cover sheet you want to delete
2. Click the object's **Properties** icon.
3. On the View Properties page, click the **Scan Cover Sheet** link.
4. Click the **Trashcan** icon that appears to the right of the cover sheet.

# Scanning documents to a temporary scan collection

If you have access to a Xerox WorkCentre with the Scan to File feature enabled, you can scan documents to DocuShare. Your WorkCentre administrator must set up a scan template before you can scan documents to DocuShare. When setting up a scan template, the administrator can choose to save each document page to a TIFF file or to save all of the document pages to a single TIFF file. Also, you may be able to use a scan template to enter DocuShare property values at the device, before scanning the document. After the document is scanned to a collection, the values you entered appear on the View Properties page for the document.

Before you begin, check with your administrator to find out which templates are available for your use and whether or not a password is required.

**Note:** Depending on which WorkCentre model you use, the steps for scanning a document can vary. DocuShare does not support scanning color images on a WorkCentre Pro 40 using JPEG compression (JPEG-in-TIFF).

To scan a document:

1. Place a document on the document glass or in the document feeder.
2. Press the **Features** button.
3. On the touch screen, press the **Scan** tab.
4. Press **Scan to File**.
5. Select the scan template.
6. If the template requires a password, do the following:
   a. Press **Added Features**.
   b. Press **Filing Setups**.
   c. Press **Login Name/Password**.
   d. Press **Password**.
   e. Type your password and press **Save**.
   f. Press **Save**.
7. If the template allows you to specify property values, enter values for the ones you want.
8. Press the **Start** button.

The WorkCentre scans the document and then sends it to the temporary scan collection on your DocuShare site. The document is stored in this collection for a designated time period. You can check the time period by clicking **WorkCentre Scan Repository** on the DocuShare home page. To keep the document, you need to save it to a permanent collection.

## Saving a scanned document to a collection

To save a scanned document to a collection, you must be logged in and have Writer permission to the collection.

To save a scanned document to a collection:

1. Go to the DocuShare home page.
2. Click **WorkCentre Scan Repository**.
3. If the **Passcode** field appears, enter the password you entered at the WorkCentre to scan the document and then click **Enter Passcode**.
4. Locate your scanned document.
5. Click **Save**.

   If you do not want to save the document to a collection, click **Delete** to remove the document from the temporary scan repository.
6. If you want to rotate the document, select the number of degrees from the **Rotate Image** menu and click **Go**.
7. From the **Document Type** menu, select the type of document to save the scanned document as.

   The menu contains types in addition to **Document** if your administrator created custom documents on your site.
8. If your administrator specified a default collection in which to save scanned documents, its title appears in the **Destination** field. Do one of the following:
   - If you want to use the default collection, go to step 13.
   - If you want to change the collection, click **Select**. The Select Destination page appears.
9. In the **Sort By** field, select **Title** to display the collections in alphabetical order or select **Handle** to display the collections in numerical order.
10. Do one of the following:
    - To find specific collections, enter any part of a collection title in the **Search** field. Click the **Go** button.
    - To display all collections, click **Show All**.
    - To display your favorite collections, click **Show Favorites**.
    - To display your personal collection, click **Show Personal Collection**.
11. In the **Possible Locations** field, select the collection to which you want to save the document.
12. Click **Apply**.
13. In the **Title** field, enter a title for the document.
14. Enter any additional information. Click a field name for a description of each property.

15. Click **Save**.

    The document is saved to the collection you specified.

**Note:** Your administrator may have given you access to a collection named **Temporary Scan Repository**. Alternatively, you can open this collection to move or delete your scanned document.

# 19

# Archiving content


- About archiving content . . . . . 19–2
- Archiving content . . . . . 19–3
- Restoring archived content . . . . . 19–5

# About archiving content

The DocuShare Archive Server enables your organization to conveniently increase document storage capacity while providing a safe location for archived content. If your site includes an Archive Server, you can move content from your site to a secondary server. When you need to retrieve your archived content, you can search for the object and, if needed, restore it.

Check with your DocuShare administrator to find out if your site uses an Archive Server.

# Archiving content

You can archive documents, Interact pages, and email messages with attachments. When you archive a document, all of its versions also are archived. To quickly archive the contents of a collection, you can select the collection and archive it. However, only the documents, Interact pages, and email messages in the collection and its subcollections are archived; the collection is not archived and remains on the DocuShare server.

There are two ways to archive content: Specify a date on which to have objects archived automatically, or select the objects you want to archive and use the **Archive** command. After an object is archived, it retains its properties, access list, and previous location on the DocuShare server.

You can archive an object if you are the logged-in owner of the object or a logged-in user with Manager permission to it.

## Archiving content automatically

By default, DocuShare uses the object's **Expiration Date** property to archive content automatically. Your DocuShare administrator can specify a different date property to use for archiving, so check with your administrator to find out which property you should use.

To archive content automatically:

1. Locate the object (document, Interact page, email message) that you want to archive.
2. Click the object's **Properties** icon.
3. Click the **Edit** link.
4. In the appropriate date field, enter the date on which you want the object archived.
5. Click **Apply**.

   DocuShare archives the object on the date you specified.

## Archiving content manually

To archive content manually:

1. Do one of the following:
   - Navigate to and open the collection that contains the objects you want to archive.
   - Run a search to find the objects you want to archive.
   - Navigate to (but do not open) the collection that contains the objects you want to archive.
2. Do one of the following:
   - To archive objects in an open collection or from a search, click the checkbox that appears next to the title of each object.
   - To archive the contents of a collection, click the checkbox that appears next to the title of the collection.
3. From the **Edit Selected** menu, select **Archive**.

The Confirm Move to Archive page appears.

**Note:** If a minus sign appears in the checkbox that precedes an object, then you do not have Manager permission to the object and cannot archive it.

4. Click the **Confirm** button to move the objects to the Archive Server.

# Restoring archived content

You can restore any object that you moved to the Archive Server to its previous location on DocuShare. If the DocuShare collection in which the object was located was deleted, you can add the object to another collection after restoring it. An object is restored with its associated properties and access list. However, if a user who previously appeared in the object's access list was deleted from the DocuShare site, the user will not appear in the restored object's access list. Also, if you are restoring an object that was owned by another user whose DocuShare account was deleted, you will become the new owner.

You can restore an object if you are the logged-in owner of the object or a logged-in user with Manager permission to it.

To restore an archived object:

1. On the navigation bar, click the **Advanced** link.

   The Advanced Search page displays.

2. Specify the search terms and options you want.
3. Depending on the page from which you are running the search, select a search scope from the **Search Within** menu.

**Note:** The search scope you select is used on the Archive Server. When an object is archived, it retains its original location path. If you know any part of the object's location path, you can narrow the search scope to speed the search.

4. In the **Server to Search** field, select **Archive Server**.
5. Click **Search**.

   The Search Results page displays. The words **Appeared In** followed by the collection name display under each object whose collection exists on DocuShare. If **Appeared In** and the collection name do not display, then the object's collection was deleted. You can restore the object as an orphan and then add it to another collection.

6. Select the objects to restore.
7. From the **Edit Selected** menu, select **Restore**.
8. On the Confirm Restore From Archive page, click **Confirm**.

   The Archive Restore Results page displays.

9. If the object is an orphan, do the following:

   a. Click the checkbox that precedes it.
   b. From the **Edit Selected** menu, select **Change Location**.
   c. On the Confirm Change Location page, click **Confirm**.
   d. Use the Change Location page to relocate the orphaned object.

   The Archive Restore Results page displays and lists the new collection in which the object appears under the object's title.

# 20

# FAQs


- Answers to frequently asked questions . . . . . 20–2

# Answers to frequently asked questions

This section provides answers to some frequently asked questions about DocuShare.

Table 20–1: FAQs

| Problem | Solution |
|---|---|
| Why am I unable to create an account on DocuShare? | Your administrator may have restricted account creation to either registered users or an administrator. Check with your DocuShare administrator. |
| Why am I unable to log into DocuShare? | Make sure you are using a browser that supports logging into a system. Check with your DocuShare administrator to find out which browsers support logging. Also, make sure your browser is set to accept cookies.<br><br>This problem can also occur when your browser is not set to refresh the page with every visit to it. In this case, you are actually logged in, but are seeing an out-of-date page. |
| I forgot my DocuShare username. What should I do? | On the navigation bar, click the **Users & Groups** link. On the List page click **Show All** to display all the users on your site. Locate and then click your name. The **Username** field on the Properties page displays your username. |
| I forgot my DocuShare password. What should I do? | Do not create another user account. Contact your DocuShare administrator, who can set another password for you. |
| Why does a newly added object not display when I search for it? | After adding an object to your site, wait a few seconds before searching for it as DocuShare needs to finish indexing the object and its properties. |
| Why does DocuShare find objects that contain a property value I did not specify? | When a property is assigned several comma-separated values, DocuShare treats the comma like a space. Therefore, DocuShare will find objects that contain adjacent property values.<br><br>For example, if a document's Author property value is Susan George, Taylor Jones, DocuShare will find the document if you search for Author or Any Part contains Susan George, Taylor Jones, or George Taylor. |

Table 20–1: FAQs

| Problem | Solution |
|---|---|
| Why does Netscape Navigator hang when I try to upload a document to DocuShare? | Check to see if the document is open in its associated application (for example, Word or PowerPoint). If it is, close the document and try the upload again. (This is a suspected bug in the Netscape-Windows interaction.) |
| Why am I unable to see a document I uploaded to DocuShare? I did not have any problems during the upload. | Check your browser's proxy settings. You should not be using a proxy server to access your DocuShare server. |
| I uploaded a document to DocuShare and received an error saying it had an invalid index or was unable to open the collection. What should I do? | If you return to the collection to which the document was added, you should find that it was correctly uploaded. If so, the problem was with the search indexing step that occurs after your document has been uploaded. The document is stored but not indexed. Report the problem to your administrator. |
| When I click the title of a document in DocuShare, I get the message “Unknown File Type - You have started to download a file of type application/....” What should I do? | Make sure your browser is configured to use a helper application to view this type of document. |
| I am using Internet Explorer. When I click a PDF document in DocuShare, I just get a blank page. Why does the file not open? | This is a known interaction problem between Internet Explorer and Acrobat (PDF) files. Contact your administrator for help. |
| Why does the page not display properly after I add HTML tags to the object's properties? | DocuShare allows you to add HTML tags to text-based properties such as an object's Description or Summary. You should limit use of HTML to simple formatting commands like font changes and lists. Including header commands like <HTML>, <HEAD>, or <BODY> will most likely interfere with DocuShare's own HTML commands, leaving a page that is either blank or very poorly formatted. You should also avoid using any tags in Title and Summary properties that affects the vertical layout, such as IMG and list directives, because those two properties are displayed in contexts that assume simple strings. |
| What should I do if I cannot find an object or a document? | DocuShare provides a variety of search features to help you quickly find objects. See DocuShare searches for information on how to run a search. |

Table 20–1: FAQs

| Problem | Solution |
|---|---|
| I am logged into DocuShare and when I try to access an object, I receive a message that states “Not Authorized.” What should I do? | Contact the object’s owner, who can give you access. |
| I accidentally deleted a collection without deleting the objects it contained. Now I cannot find those objects. What should I do? | When you delete a collection, but not its contents, and the objects are not located in another collection, they become orphaned. You are unable to access orphaned objects from a collection. However, the objects are still stored on your site. Your administrator can relocate orphaned objects in a collection so you can access them again. Or, you can access an orphaned object if you know its unique address (for example, http://sales.acme.com/docushare/dsweb/Get/Document-128). |
| After moving a collection to a new location, why am I unable to find it in either the new or the old location? | You accidentally orphaned the collection, which means you cannot access it from another collection. The collection is still stored in DocuShare. Your administrator can recover the orphaned collection by relocating it in a collection. Or, you can access the collection if you know its unique address (for example, http://sales.acme.com/docushare/dsweb/Get/Collection-12). |
| I deleted an object from a collection. Why can I still see it when I navigate to the collection page? | If you used the browser’s Back button, Favorites, or Bookmarks to navigate, you may have accessed a cached version of the collection page. Click the browser’s Refresh or Reload button to display the latest version of the page. |
| I logged into DocuShare, navigated the site, and then used my browser’s Back button a few times. Why am I now logged in as a Guest? | You have accessed a cached version of the page. Click the browser’s Refresh or Reload button to display the latest version of the page. You should see your username on the navigation bar. |
| I use Netscape Navigator to access DocuShare. After rotating a scanned image, why does it not appear rotated? | You need to change the browser’s cache setting. Open the Preferences window, and click **Advanced** then **Cache**. Under **Compare the page in the cache to the page on the network**, select **Everytime I view the page**. |

Table 20–1: FAQs

| Problem | Solution |
|---|---|
| Why can changing the permissions of a collection and its objects take longer than expected? | The time it takes to change the permissions of a collection and its objects is dependent on the number of collection objects, which includes all nested collections and their contents. When changing the collection's permissions, DocuShare must examine each object's access list and either merge the changes or replace the access list. That is why DocuShare processes the permissions change in the background, which allows you to complete other tasks.<br><br>As an alternative, your administrator can use a command line utility to change the permissions of a collection that contains a large number of objects. |

# A

# WebDAV folders


- Using WebDAV folders . . . . . A–2

# Using WebDAV folders

DocuShare supports the WebDAV (Web Distributed Authoring and Versioning) protocol, which enables you to access DocuShare collections and documents through a WebDAV-compliant folder. You do not need client software installed on your computer. If you are a Windows 2000 or XP user, simply go to **My Network Places** to add a DocuShare server as a network place. If you are using a Macintosh with OS X, select **Connect to Server** to add the URL for a DocuShare server.

**Note:** In both Windows and OS X, you must append the DocuShare server's URL with */* **webdav**. When you are prompted to log in, use your DocuShare username and password.

## Document titles in WebDAV folders

Your DocuShare administrator controls how document titles are displayed in collections. For example, a title might have a file extension appended to it. If you have any questions about how document titles are displayed, see your administrator.

# B

# DocuShare portal integration


- Accessing DocuShare in a portlet . . . . . B–2

# Accessing DocuShare in a portlet

If you use a desktop portal application, you can access DocuShare in a portlet. Before you can use this feature, your DocuShare administrator and a portal administrator must set up your site to support the feature.

To access DocuShare in a portlet:

1. Set up your browser to accept cookies from your DocuShare server. Refer to your browser documentation for details.
2. Launch your desktop portal application.

   DocuShare appears in a portlet.
3. To change the view in the portlet, click the **Edit** button located in the upper-right corner of the portlet.
4. From the **Show** menu, select the collection or workspace (*DocuShare CPX only*) that you want to view.
5. In the **Portlet Height (px)** field, enter a number to change the height of the portlet. The height is measured in pixels.
6. Click **Submit**.

   The collection or workspace appears in the portlet. You can navigate the container to view the content to which you have access.

# Index


## A

abstract (document), showing and hiding in search results 14–4, 14–7

access list 5–2

access permissions 1–6, 5–2

- *See also* initial permissions, setting for objects
- and DocuShare administrator 1–6
- applying to container 5–6
- applying to document versions 5–7
- changes processed in the background 5–6
- changing 5–4
- changing for workspace 7–5 to 7–6
- viewing 5–3

accounts, *See* group account, user account

Accrue operator, using in searches 14–7

activity history, viewing 2–6

Add to Favorites (Edit Selected menu) 3–7

adding comments to a document 4–14

adding objects

- calendars 6–3
- collections 3–3
- content rules 13–3
- discussions 10–3
- documents 4–3
- events to calendars 6–8
- group accounts 2–9 to 2–10
- notifications 12–3
- topics to discussions 10–7
- URLs 11–3
- user accounts 2–3
- weblogs 9–3
- wikis 8–3
- workspaces 7–3

And Not operator, using in searches 14–8

And operator, using in searches 14–7

Archive (Edit Selected menu) 3–7

Archive Server 19–2

- archiving content to 19–3 to 19–4
- restoring content from 19–5

archiving content

- about 19–3
- automatically 19–3
- manually 19–3 to 19–4

asterisk, using in searches 14–9

## B

background jobs 5–6, 15–2

blog, *See* weblog

booleans, *See* logical operators

breadcrumbs, for navigation 1–4

browsing history, viewing 1–3, 1–4

## C

calendar

- *See also* personal calendar
- about 6–2
- adding events 6–8
- adding to container 6–3
- applying permissions to contents 5–6
- changing access permissions 5–4
- changing its location 6–6
- changing its view 6–4
- changing owner 5–5
- changing properties 6–5
- deleting 6–7
- viewing change history 6–5
- viewing properties 6–5

calendar event

- viewing change history 6–9

calendar event, *See* event

calendar view

- changing 6–4, 7–9
- day view 6–2, 7–9

month view 6–2
week view 6–2, 7–9

calendars portlet 7–2

changing properties 7–10

change history, viewing for objects 2–14, 3–4, 4–15, 6–5, 6–9, 7–11, 8–8, 9–7, 10–4, 10–8, 11–4, 14–12

Change Location (Edit Selected menu) 3–7

Change Owner (Edit Selected menu) 3–7

changing location

calendar 6–6
collection 3–5
discussion 10–5
document 4–16
event 6–10
saved query 14–13
topic 10–9
URL 11–5
weblog 9–8
wiki 8–9
workspace 7–12

changing properties

calendar 6–5
collection 3–4
discussion 10–4
document 4–15
event 6–9
group account 2–10
notification 12–6
reply 10–8
saved query 14–12
topic 10–8
URL 11–4
user account 2–4
version 4–11
weblog 9–7
wiki 8–8
workspace 7–11

checking in an edited document 4–7

checking out a document 4–7

collection 3–2

*See also* personal collection
about 1–5
adding 3–3
adding document to 4–3
applying permissions to contents 5–6
changing access permissions 5–4
changing its location 3–5
changing owner 5–5
changing properties 3–4
deleting 3–6
editing multiple objects in 3–7
restoring after deleting 3–6, 4–17, 6–7
setting up for routing documents 17–6
viewing change history 3–4
viewing properties 3–4

comment

deleting from weblog entry 9–6
viewing 9–6

comments

adding to a document 4–14
adding to weblog entry 9–6
viewing for documents 4–14

content portlet 7–2

changing properties 7–10

content rule

about 13–2
about disabled content rules 13–4
creating 13–3
deleting 13–5
event triggers 13–2
restoring after deleting 13–5
tips when creating 13–3
viewing 13–4

Copy (Edit Selected menu) 3–7

Copy Shortcuts (Edit Selected menu) 3–7

cover sheet, *See* scan cover sheet

CPX user 2–2

creating

group account 2–9 to 2–10
user account 2–3

Cut (Edit Selected menu) 3–7


# D


DataGlyph 18–3

day view, calendar 6–2

Delete (Edit Selected menu) 3–7

deleted tasks, viewing all 17–14

deleted tasks, viewing for document 17–15

deleting

calendar 6–7
collection 3–6
completed routing tasks you assigned 17–8

content rule 13–5
discussion 10–6
document 4–17
event 6–11
expired topics 10–11
group account 2–14
notification 12–7
online meeting 16–7
reply 10–10
saved query 14–14
topic 10–10
URL 11–6
weblog 9–9
wiki 8–10
workspace 7–13

discussion
about 10–2
adding to a container 10–3
adding topics 10–7
applying permissions to contents 5–6
changing access permissions 5–4
changing its location 10–5
changing owner 5–5
changing properties 10–4
deleting 10–6
restoring after deleting 10–6
setting expiration date for topics 10–3
viewing change history 10–4
viewing properties 10–4

document
about 4–2
adding comments to 4–14
adding new version of existing 4–9
adding to collection 4–3
applying permissions to versions 5–7
archiving 19–3 to 19–4
changing access permissions 5–4
changing its location 4–16
changing owner 5–5
changing properties 4–15
checking in new version 4–7
checking out 4–7
deleting 4–17
downloading 4–4
editing 4–7
exporting 4–13
locking 4–12
restoring from Archive Server 19–5
routing to users 17–3 to 17–5
saving scanned document to a collection 18–6
scanning at a WorkCentre 18–5
scanning using scan cover sheets 18–3
unlocking 4–12
viewing 4–4
viewing change history 4–15
viewing comments 4–14
viewing content and properties 4–4
viewing deleted routing tasks 17–15
viewing duplicates 4–6
viewing in HTML format 4–5
viewing in PDF format 4–5
viewing its version history 4–10
viewing properties 4–15
viewing routing tasks in progress 17–15

DocuShare 1–2
accessing 1–3
and WebDAV folders A–2
FAQs 20–2 to 20–5
icons 1–5
logging in 1–7
logging out 1–7
navigating 1–4

DocuShare Archive Server 19–2

DocuShare Client applications
DocuShare Outlook Client 1–9
DocuShare Windows Client 1–9
PaperPort Link to DocuShare 1–9

DocuShare federated server 2–6

DocuShare federation 2–6

DocuShare objects, *See* objects

DocuShare Outlook Client 1–9

DocuShare user 2–2

DocuShare User Group 1–8

DocuShare Windows Client 1–9

domain
changing for group 2–12
changing for user 2–6

downloading a document 4–4


# E


Edit Selected menu 3–7

editing a document 4–7

email message
limiting number received for notifications 12–3

receiving for a notification 12–3
receiving when routing task is assigned 17–11
sending to a group 2–13
event
*See also* recurring event
adding to calendar 6–8
changing access permissions 5–4
changing its location 6–10
changing owner 5–5
changing properties 6–9
deleting 6–11
viewing properties 6–9
expired topic
deleting 10–11
viewing 10–11
exporting a document 4–13

# F

FAQs 20–2 to 20–5
favorites
adding objects to 15–3
removing objects from 15–3
viewing 15–3
federated server
mapping to 2–6 to 2–7
removing mapping 2–8
searching 14–4, 14–6 to 14–7
feed, using to view updated content on DocuShare 12–2
frequently asked questions, *See* FAQs

# G

group
viewing change history 2–14
group account
changing domain 2–12
changing group members 2–11
changing group owner 2–12
changing properties 2–10
creating 2–9 to 2–10
deleting 2–14
searching for 2–15
sending email to members 2–13
viewing list of 2–15
viewing list of groups of which you are a member 15–7
viewing properties 2–10
guest
viewing what's new on DocuShare 14–3
guest user 2–2

# H

history
activity, viewing 2–6
browsing, viewing 1–3, 1–4
change, viewing 2–14, 3–4, 4–15, 6–5, 6–9, 7–11, 8–8, 9–7, 10–4, 10–8, 11–4, 14–12
document version, viewing 4–10
home page 1–3
features 1–3
HTML format, viewing a document in 4–5

# I

icons
for access permissions 5–2
for objects 1–5

# J

JSR 168 portlet, accessing DocuShare in B–2

# K

key icons 5–2

# L

LDAP (Lightweight Directory Access Protocol)
and user accounts 2–2
changing group domain 2–12
changing user domain 2–6
changing user password 2–5
changing username 2–5

locking a document 4–12
logged-in user, and appearance of user icon 2–15, 7–4
logging in 1–7
logging out 1–7
logical operators
types 14–7
using in searches 14–6 to 14–7

# M

Manager access permission 1–6, 5–2
mapping a user account to a federated server 2–6 to 2–7
members
changing for group 2–11
sending email to group 2–13
membership group 7–3
changing group assigned to workspace 7–5
changing group members 7–4 to 7–5
membership portlet 7–2
changing properties 7–10
minus sign, using in searches 14–4
month view, calendar 6–2
My DocuShare
about 15–2
launching an online meeting 16–5
viewing favorites 15–3
viewing groups of which you are a member 15–7
viewing personal calendar 15–5
viewing personal collection 15–4
viewing personal trashcan 15–6
viewing routing tasks 15–7
My Tasks
using to check tasks you assigned 17–7
using to view progress reports 17–9, 17–14
using to view tasks assigned to you 17–11

# N

navigating DocuShare 1–4
navigation bar 1–4
non alphanumeric characters, using in searches 14–9
notification
about 12–2
adding 12–3
changing properties 12–6
creating a recipient list for 12–5
deleting 12–7
events of interest 12–2
requirements for using 12–2
restoring after deleting 12–7
time periods 12–3
turning off and on 12–6
turning off selected event notifications 12–3
viewing 12–4
viewing properties 12–6

# O

object properties 1–6
objects
*See also* calendar, collection, discussion, document, event, group account, saved query, topic, URL, user account, Weblog, wiki, workspace
about 1–5
changing access permissions 5–4
changing owner 5–5
editing multiple in collection 3–7
icons 1–5
searching for 14–4 to 14–7
online meeting
about 16–2
adding attendees 16–3 to 16–4
deleting 16–7
joining 16–6
launching 16–5
scheduling 16–3 to 16–4
viewing ones you scheduled 15–7
Or operator, using in searches 14–7
orphan object 4–16, 8–9, 9–8
adding to collection after restoring from Archive Server 19–5
owner
changing for group 2–12
changing for object 5–5

# P

page footer 1–4
PaperPort Link to DocuShare 1–9
password, changing 2–5
Paste (Edit Selected menu) 3–7
PDF file, creating by scanning 18–3
PDF format, viewing a document in 4–5
permissions, *See* access permissions
personal calendar 15–5
  creating 15–5
personal collection 15–4
  adding objects to 15–4
personal trashcan, using 15–6
placeholder document 4–3
plus sign, using in searches 14–4
portal application, and DocuShare B–2
portlet, accessing DocuShare in B–2
preferred version
  and maximum versions 4–3
  changing 4–10
  defined 4–10
progress reports, viewing 17–9
properties
  viewing and editing with document content 4–4
properties, and objects 1–6

# Q

question mark, using in searches 14–9
quotation marks, using in searches 14–4, 14–6

# R

Reader access permission 1–6, 5–2
Read-Only user 2–2
recipient list
  changing for document routing 17–4
  creating for notification 12–5
recurring event
  adding to calendar 6–8
  deleting series of 6–11
removing user account mapping from a federated server 2–8
Rename (Edit Selected menu) 3–7
rendition
  viewing for versions 4–11
  viewing HTML 4–5
  viewing PDF 4–5
reply
  adding to topic 10–7
  changing properties 10–8
  deleting 10–10
  viewing change history 10–8
  viewing properties 10–8
reserved characters, using in searches 14–9
Restore (Edit Selected menu) 3–7
restoring archived content 19–5
restoring deleted objects 3–6, 4–17, 6–7, 7–13, 8–10, 9–9, 10–6, 11–6, 12–7, 13–5, 14–14
retain login for future 1–7
Route (Edit Selected menu) 3–7
routed document
  acknowledging receipt of 17–13
  approving 17–11
  disapproving 17–11
  publishing new version of 17–10
  removing after sent for information 17–13
  reviewing 17–12
routing a document
  about 17–2
  automatically after adding to collection 17–6
  including additional documents 17–3
  routing order 17–4
  to users 17–3 to 17–5
  types of routing tasks 17–3
  using a saved Routing Slip 17–3
Routing Slip 17–2
  re-using 17–3
  saving 17–5
routing tasks
  checking status of your tasks 17–7 to 17–8
  deleting completed 17–8

viewing all deleted 17–14
viewing for document 17–15
viewing tasks assigned to you 15–7, 17–11
RSS feed, *See* feed 12–2

# S

saved query
adding to container 14–11
changing access permissions 5–4
changing its location 14–13
changing owner 5–5
changing properties 14–12
restoring after deleting 14–14
viewing change history 14–12
saved Routing Slip, using 17–3
saving
a Routing Slip 17–5
scanned document to a collection 18–6
search query 14–11
scan cover sheet
creating 18–3
deleting 18–4
using 4–3, 18–4
scan template 18–5
scanned document
checking length of time in temporary collection 18–5
receiving URL after saving 18–6
saving to a collection 18–6
scanning documents
about 18–2
at a WorkCentre 18–5
using scan cover sheets 4–3, 18–3
Search Available to, defined 5–4
search words, separator 14–4
searches 14–2
*See also* saved query
how to specify exact phrase 14–4, 14–6
running 14–4 to 14–7
saving 14–11
stop words 14–10
using minus signs 14–4
using non alphanumeric characters 14–9
using plus signs 14–4
using wildcards 14–9
searching for objects 14–4 to 14–7
combining search terms 14–6 to 14–7
finding user and group accounts 2–15
on federated servers 14–4, 14–6 to 14–7
running a word search 14–4
using search options 14–5
shortcuts
adding to workspace 7–8
removing from workspace 7–8
shortcuts portlet 7–2
changing properties 7–10
snippet (document), showing and hiding in search results 14–4, 14–7
stemming 14–2
stop words 14–10

# T

tasks, *See* routing tasks
temporary scan collection
checking how long scanned documents are stored 18–5
moving scanned document from 18–6
TIFF file, creating by scanning 18–5
topic
adding to discussion 10–7
changing access permissions 5–4
changing its location 10–9
changing owner 5–5
changing properties 10–8
deleting 10–10
deleting expired 10–11
replying to 10–7
viewing change history 10–8
viewing expired 10–11
viewing properties 10–8

# U

unlocking a document 4–12
uploading a document 4–3
URL
about 11–2

adding to container 11–3
changing access permissions 5–4
changing its location 11–5
changing owner 5–5
changing properties 11–4
deleting 11–6
restoring after deleting 11–6
viewing change history 11–4
viewing properties 11–4

user account

and user levels 2–2
changing domain 2–6
changing password 2–5
changing properties 2–4
changing username 2–5
creating 2–3
mapping to federated server 2–6 to 2–7
removing user account mapped to federated server 2–8
searching for 2–15
viewing activity history 2–6
viewing list of 2–15
viewing properties 2–4

user icon, and indication of logged-in status 2–15, 7–4

user levels 2–2

username, changing 2–5


# V


version comments, adding 4–7, 4–9

version history, viewing 4–10

version, document

adding edited document 4–7
adding new document 4–9
changing preferred version 4–10
changing properties 4–11
publishing routed document 17–10
specifying maximum to save 4–3
viewing 4–10
viewing properties 4–11
viewing renditions 4–11

viewing

a document 4–4
a document in HTML format 4–5
a document in PDF format 4–5
access permissions 5–3
document comments 4–14
document content and properties 4–4
document version history 4–10
duplicate documents 4–6
expired topics 10–11
new content 14–3
progress reports for routing tasks 17–9
version renditions 4–11
your activity history 2–6

viewing properties

calendar 6–5
collection 3–4
discussion 10–4
document 4–15
event 6–9
group account 2–10
notification 12–6
reply 10–8
topic 10–8
URL 11–4
user account 2–4
weblog 9–7
wiki 8–8
workspace 7–11


# W


WebDAV folder, using with DocuShare A–2

WebEx™ Meeting Center 16–2

weblog

about 9–2
adding to container 9–3
changing its location 9–8
changing properties 9–7
deleting 9–9
moderated 9–2
posting entries 9–4
restoring after deleting 9–9
viewing change history 9–7
viewing properties 9–7

weblog entry

adding comment to 9–6
adding to weblog 9–4
approving 9–5
deleting 9–5
editing 9–4

week view, calendar 6–2

What's New

using 14–3

wiki

about 8–2

adding 8–3
adding content 8–4
attaching documents 8–5
changing its location 8–9
changing page name 8–6
changing properties 8–8
deleting 8–10
inserting images 8–5
linking pages 8–4
printing wiki pages 8–7
restoring after deleting 8–10
viewing change history 8–8
viewing linked pages 8–5
viewing properties 8–8

wildcards, using in searches 14–9

WorkCentre, and scanning documents 18–5

workflow, *See* routing a document

workspace

about 1–5, 7–2
adding 7–3
adding content 7–7
adding shortcuts 7–8
changing access permissions 7–5 to 7–6
changing its location 7–12
changing membership group members 7–4 to 7–5
changing portlet properties 7–10
changing properties 7–11
controlling access to 7–4
deleting 7–13
re-assigning membership group 7–5
removing shortcuts 7–8
restoring after deleting 7–13
viewing calendars 7–9
viewing change history 7–11
viewing properties 7–11

Writer access permission 1–6, 5–2

WYSIWYG editor, and wikis 8–4